Marché touristique lors de voyages d'affaires

[Titre fourni par le catalogueur]

Contexte

Des ministères et des organismes de tourisme du Canada se sont associés pour effectuer deux importantes études d'évaluation des activités et des éléments de motivation en matière de voyages d'agrément chez les Canadiens et les Américains.

Cette enquête, intitulée *Enquête sur les activités et les préférences en matière de voyage* (EAPMV), représente une évaluation approfondie des comportements et des éléments de motivation en matière de voyages et fournit une base de données riche et sérieuse pour élaborer des stratégies de commercialisation et créer des produits de voyage visant à attirer des touristes au Canada et en Ontario.

La série d'analyses actuellement en cours s'appuie sur la base de données de l'EAPMV pour examiner les tendances du marché et les facteurs qui motivent le comportement en matière de voyages. L'EAPMV, qui comprenait une enquête par téléphone et une enquête par courrier-réponse à laquelle les répondants devaient répondre, a été menée au Canada et aux États-Unis du 27 septembre 1999 au 16 avril 2000. L'enquête par téléphone a été menée auprès de 28 397 personnes aux États-Unis et de 18 385 personnes au Canada. Les répondants ont été choisis au hasard dans des ménages. On a demandé aux participants à l'enquête par téléphone qui avaient voyagé au cours des deux années précédentes ou qui souhaitaient faire un voyage au cours des deux prochaines années de remplir un questionnaire par courrier-réponse. En tout, 40 271 personnes se sont qualifiées pour le questionnaire par courrier-réponse. Sur ce nombre, 11 892 personnes (29,4 %) ont renvoyé le questionnaire dûment rempli. Le taux de réponse au questionnaire a été plus élevé au Canada, soit 5 490 personnes (35,2 %), qu'aux États-Unis, soit 6 405 personnes (26,0 %).

L'étude actuelle porte sur les personnes qui font des voyages d'affaires pour assister à des congrès, salons professionnels, conférences et colloques. La base de données EAPMV a servi à cerner les segments de marché qui ont assisté à un ou plusieurs congrès, salons professionnels, conférences ou colloques au cours des deux dernières années. Ce rapport fournit un profil démographique, les activités des Canadiens en matière de voyages, les intentions de voyage des Canadiens, les expériences de vacances recherchées au cours des deux années précédentes, les activités de vacances auxquelles les répondants ont participé au cours des deux dernières années, les habitudes en ce qui a trait à la consommation de médias, les sources d'information consultées pour planifier de brèves ou de longues vacances ainsi que les impressions à propos du Canada et de l'Ontario parmi les participants à ce genre de manifestations, et comparent ces dernières à celles de personnes n'y ayant pas assisté. Ce rapport illustre également le marché éventuel global et cerne les secteurs offrant les plus grandes possibilités quant à la commercialisation, à la publicité et la promotion du Canada et de l'Ontario auprès de personnes assistant à des to congrès, salons professionnels, conférences et colloques.

Marché touristique lors de voyages d'affaires
- Résumé -

Les Américains étaient 29,4 % plus susceptibles que les Canadiens d'avoir effectué un voyage d'affaires pour assister à au moins un congrès, un salon professionnel, une conférence ou un colloque (p.ex., événement d'affaires) au cours des deux années précédentes. Au total, 28,1% des Américains et 21,7% des Canadiens d'âge adulte ont assisté à au moins l'un de ces événements à l'extérieur de leur ville. La participation à des événements d'affaires augmente beaucoup selon le niveau de scolarité et le revenu du ménage du répondant. Les hommes étaient aussi plus susceptibles d'avoir assisté à ce genre d'événements que les femmes, cet écart étant encore plus marqué au Canada. Les jeunes couples aisés, les familles aisées, les couples d' âge mur et âgés ainsi que les célibataires aisés d' âge mur étaient tous plus susceptibles d'avoir assisté à un événement d'affaires hors de leur ville au cours des deux années précédentes. Ces voyageurs représentent un marché touristique attrayant pour le Canada, d'après leur opulence et leurs habitudes de voyage. Ils étaient plus susceptibles d'avoir effectué un voyage au Canada au cours des deux années précédentes et plus susceptibles d'avoir l'intention de voyager au Canada au cours des deux années suivantes. En vacances, les expériences qu'avaient recherchées ces voyageurs au cours des deux années précédentes témoignaient de leur relative opulence. Ils étaient plus susceptibles que le voyageur moyen d'avoir recherché toute une gamme d'expériences de vacances et paraissaient s'intéresser à des activités éclectiques. Ils étaient en particulier susceptibles d'avoir recherché des expériences de vacances liées au plaisir (p.ex., dîner fin, vie nocturne, idylle et détente, et exploration (p.ex., visite de musées, de galeries d'art, de lieux historiques et de sites naturels). De plus, leurs préférences s'écartaient de la norme en raison de l'enthousiasme qu'ils montraient à l'égard de tout un éventail d'activités culturelles et de divertissements, manifestations sportives professionnelles, magasinage et restaurants, visites de musées, de galeries d'art, de lieux historiques, en particulier. Ils s'adonnaient aussi à une vaste gamme d'activités de plein air pendant leur voyage, notamment au golf, à la natation et au bronzage, ainsi qu'à des exercices de conditionnement physique. Les voyageurs assistant à des événements d'affaires hors de leur ville étaient plus susceptibles que les autres de préférer un hébergement luxueux (p.ex., centres de villégiature, hébergements avec garni, installation thermale, restaurants fins). Ils étaient également plus susceptibles par rapport au voyageur moyen d'avoir visité des caves vinicoles et d'avoir fait des excursions touristiques d'une journée en bateau, en train, ou fréquemment au volant de leur voiture.

Les voyageurs assistant à des événements d'affaires hors de leur ville consultaient une vaste gamme de ressources pour planifier leur voyage. Ils étaient beaucoup plus susceptibles de faire des recherches sur Internet et des réservations de voyage. Les autres sources de renseignements importantes parmi ces voyageurs pour planifier un voyage

étaient les agences de voyage et diverses publications imprimées (magazines d'intérêt général et revues touristiques, en particulier).

Travel Activities & Motivation Survey

Out-of-Town Business Travel Market Profile Report

TAMS
Travel Activities & Motivation Survey

November, 2001

Lang
RESEARCH

Travel Activities & Motivation Survey

Prepared By:

Lang Research Inc.

on behalf of

Atlantic Tourism Partnership

Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food & Rural Affairs

Ontario Tourism, Culture & Recreation

Ontario Tourism Marketing Partnership

Parks Canada

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TAMS
Travel Activities &
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Lang

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Out-of-Town Business Travel Market

104-00668/

- Executive Summary -

Americans were 29.4% more likely than Canadians to have attended at least one out-of-town convention, trade show, conference or seminar (i.e., business event) during the past two years. Overall, 28.1% of American adults and 21.7% of Canadian adults had attended at least one of these out-of-town business events.

Attendance at out-of-town business events increased sharply with the level of education and household income of the respondent. Men were also more likely to have attended such events than women with this gender gap more evident in Canada. Affluent Young Couples, Affluent Families, Affluent Mature and Senior Couples and Affluent Mature Singles were all more likely to have attended out-of-town business events during the past two years.

Out-of-town business event attendees represent an attractive travel market for Canada based on their affluence and travel patterns. They were more likely to have travelled in Canada during the past two years and more likely to expect to travel in Canada during the next two years.

The relative affluence of business event travellers is reflected in the vacation experiences sought during the past two years. They were more likely than the average traveller to have sought out a wide variety of vacation experiences and appear to value eclectic vacations. They were especially likely to have sought out personal indulgence (e.g., enjoying fine dining and nightlife), romance and relaxation, and exploratory vacation experiences (e.g., visiting museums and art galleries, visiting historical sites, viewing natural wonders). Their preferences were further distinguished from the norm by their enthusiasm for a full range of culture and entertainment activities; especially attending professional sports events, shopping and dining, and visiting museums, galleries and historical sites. They also embraced a wide range of outdoor activities while travelling, most notably golfing, swimming and sunbathing, and fitness activities.

Out-of-town business event attendees were more likely than others to prefer luxurious accommodations (e.g., resorts, accommodations offering B&B, spa or gourmet restaurant facilities). They were also more likely to have taken wine tours and scenic day tours by boat or train and frequently tour using their personal vehicles when compared to the average traveller.

Out-of-town business event attendees consulted a wide array of information sources to plan their travel. They were much more likely than others to use the Internet for researching as well as for booking travel arrangements. Travel agents and various print publications (especially general interest and travel magazines) also were important sources of information to help plan trips.

Background

An association of Canadian tourism ministries and organizations has collaborated to conduct two large-scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities & Motivation Survey* (TAMS), represents the comprehensive assessment of travel behaviour and motivators, and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace, as well as the factors which motivate travel behaviour. The TAMS database consists of a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. Persons participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mail-back questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.5%) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2%) returning the questionnaire while 6,405 (26.0%) of the U.S. respondents returned the questionnaire.

The current study examines persons who travelled out-of-town to attend business conventions, trade shows, conferences and seminars. The TAMS database was used to identify sectors of the market that had attended one or more out-of-town business conventions, trade events, conferences or seminars during the past two years. This report examines the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations, and impressions of Canada and Ontario among attendees, and compares these to those of non-attendees. This report also identifies the overall market potential of each segment of the market to indicate those segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada or Ontario to attendees of conventions, tradeshows, conferences and seminars.

Business Event Attendance Index:
Construction of the Index

The TAMS mailback survey contained three items specifically associated with travel to attend out-of-town business conventions, tradeshows, conferences or seminars which were use to construct an overall Attendee Participation Index. These were:

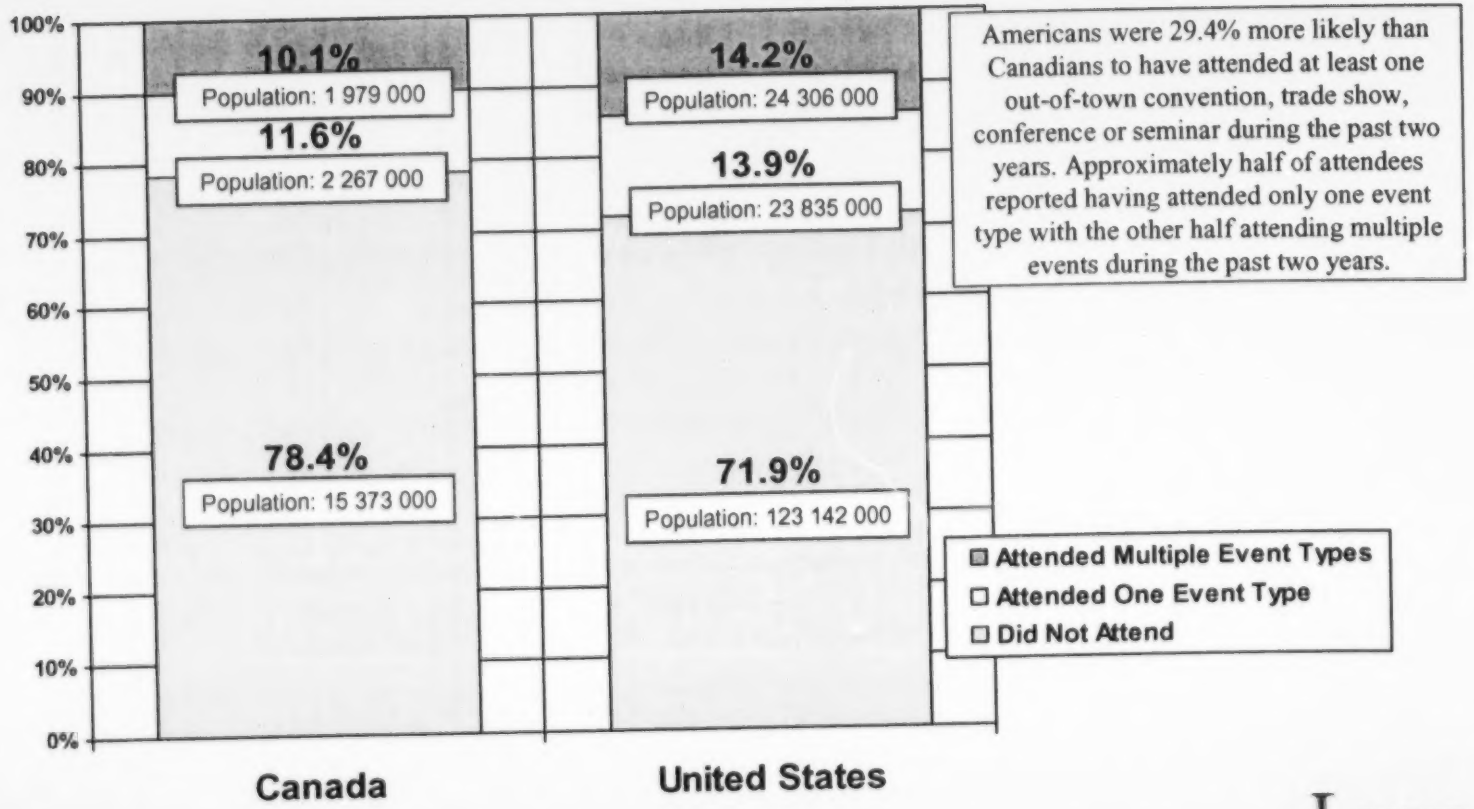
- Having attended out-of-town business conventions during the past two years
- Having attended out-of-town conferences or seminars during the past two years
- Having attended out-of-town tradeshows during the past two years

The responses to these three items were combined to overall participation and classified into three groups:

- **Non-attendee**: Did not attend an out-of-town convention, tradeshow, conference or seminar
- **Attended One Event Type**: Attended either an out-of-town convention, tradeshow, conference or seminar, but not more than one
- **Attended Multiple Event Types**: Attended at least two of the three out-of-town event types

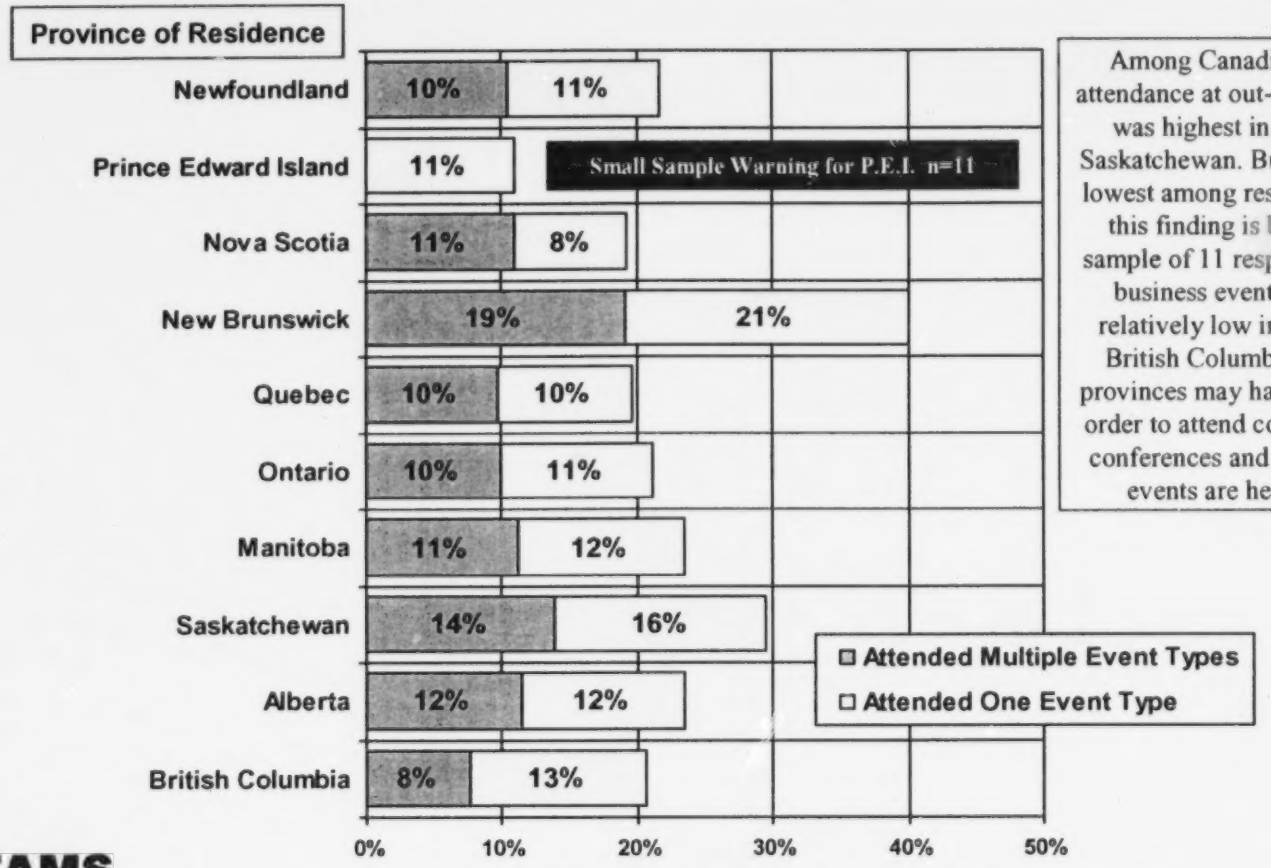
Attending Out-of-Town Business Events
Canada versus United States

Base: Number of event types attended:
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



Attending Out-of-Town Business Events
Canada: By Province

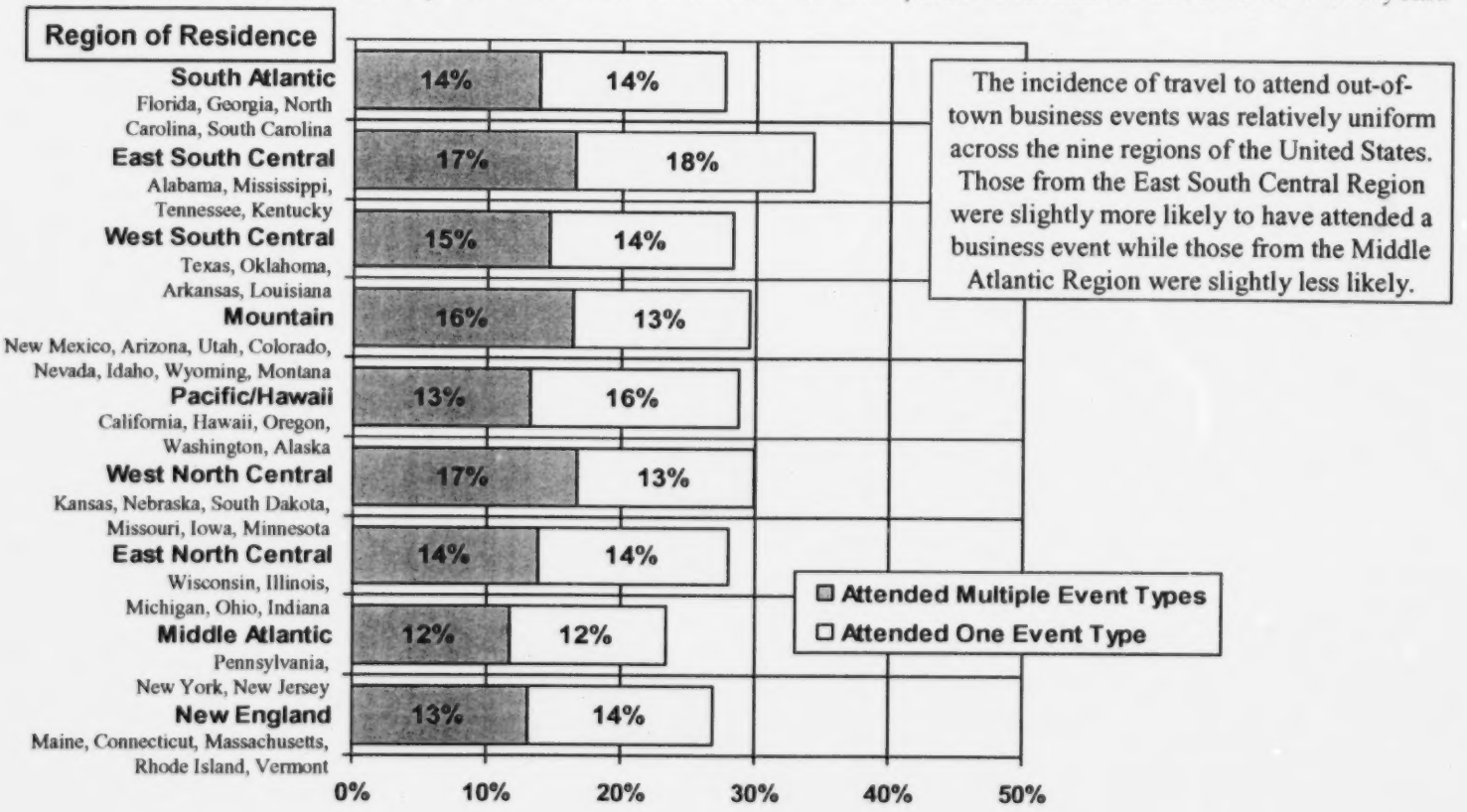
Base: Number of types attended;
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years

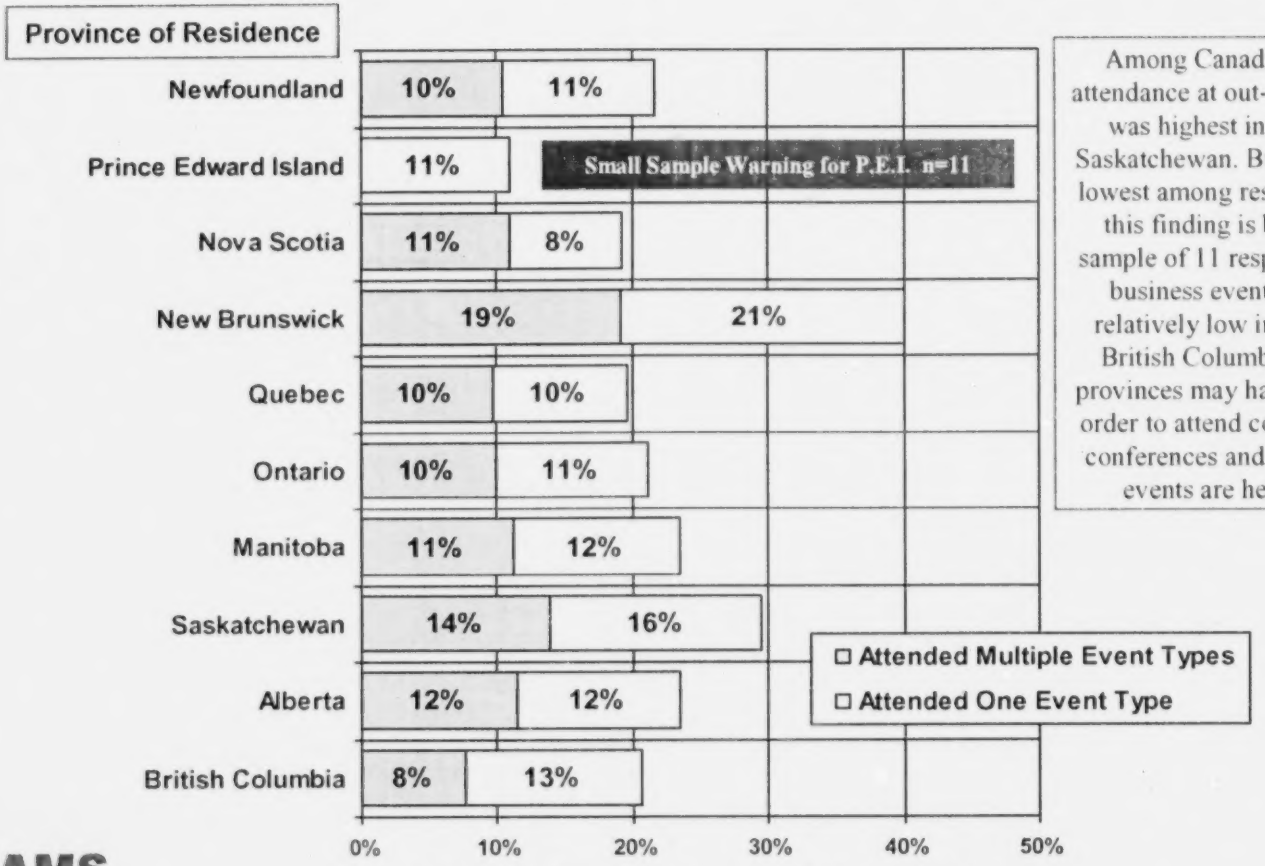


Among Canadians, the incidence of attendance at out-of-town business events was highest in New Brunswick and Saskatchewan. Business event travel was lowest among residents of PEI (although this finding is based on a very small sample of 11 respondents). Out-of-town business event attendance was also relatively low in Ontario, Quebec and British Columbia. Residents of these provinces may have less need to travel in order to attend conventions, tradeshows, conferences and seminars because such events are held in their own city.

Attending Out-of-Town Business Events
United States: By Region

Base: Number of event types attended;
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years





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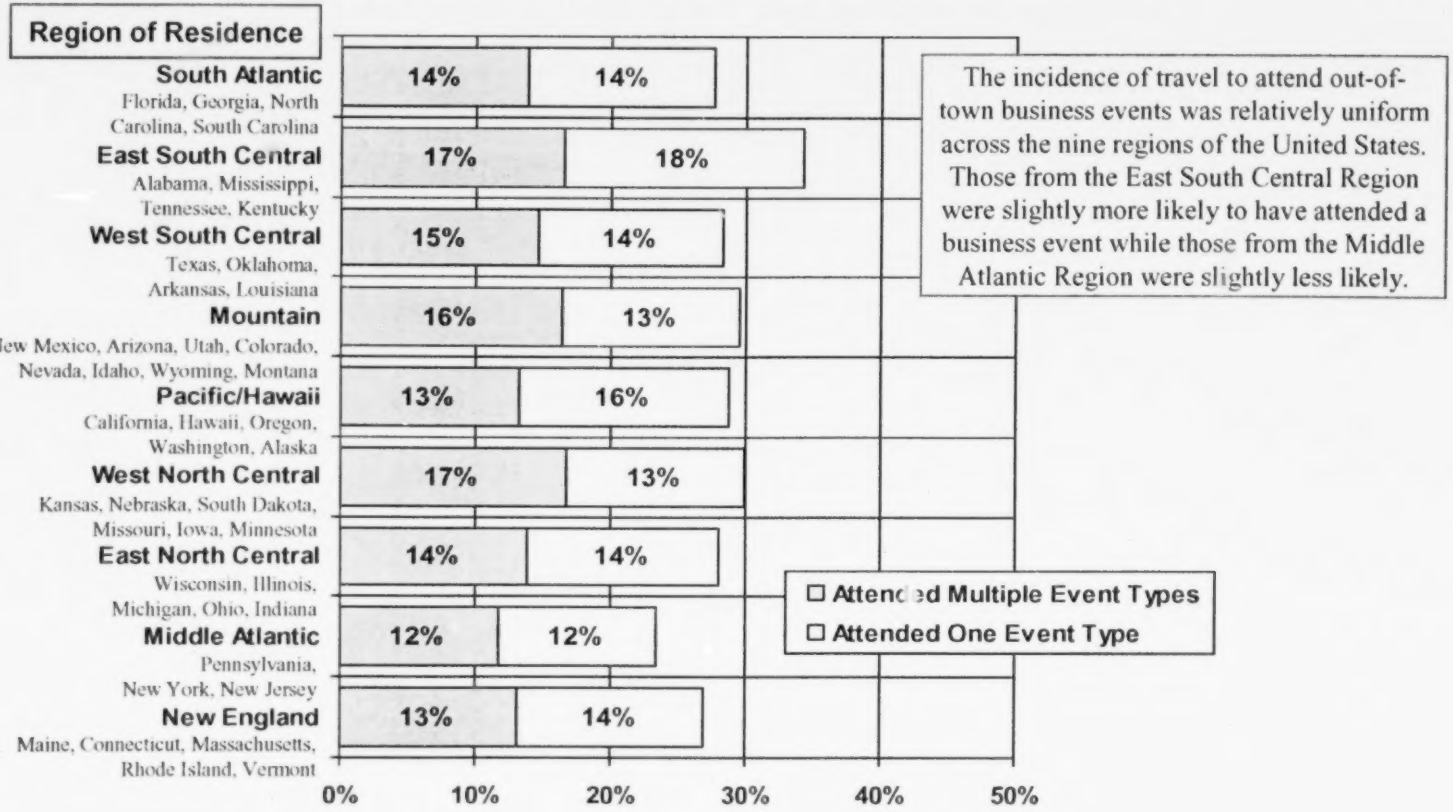
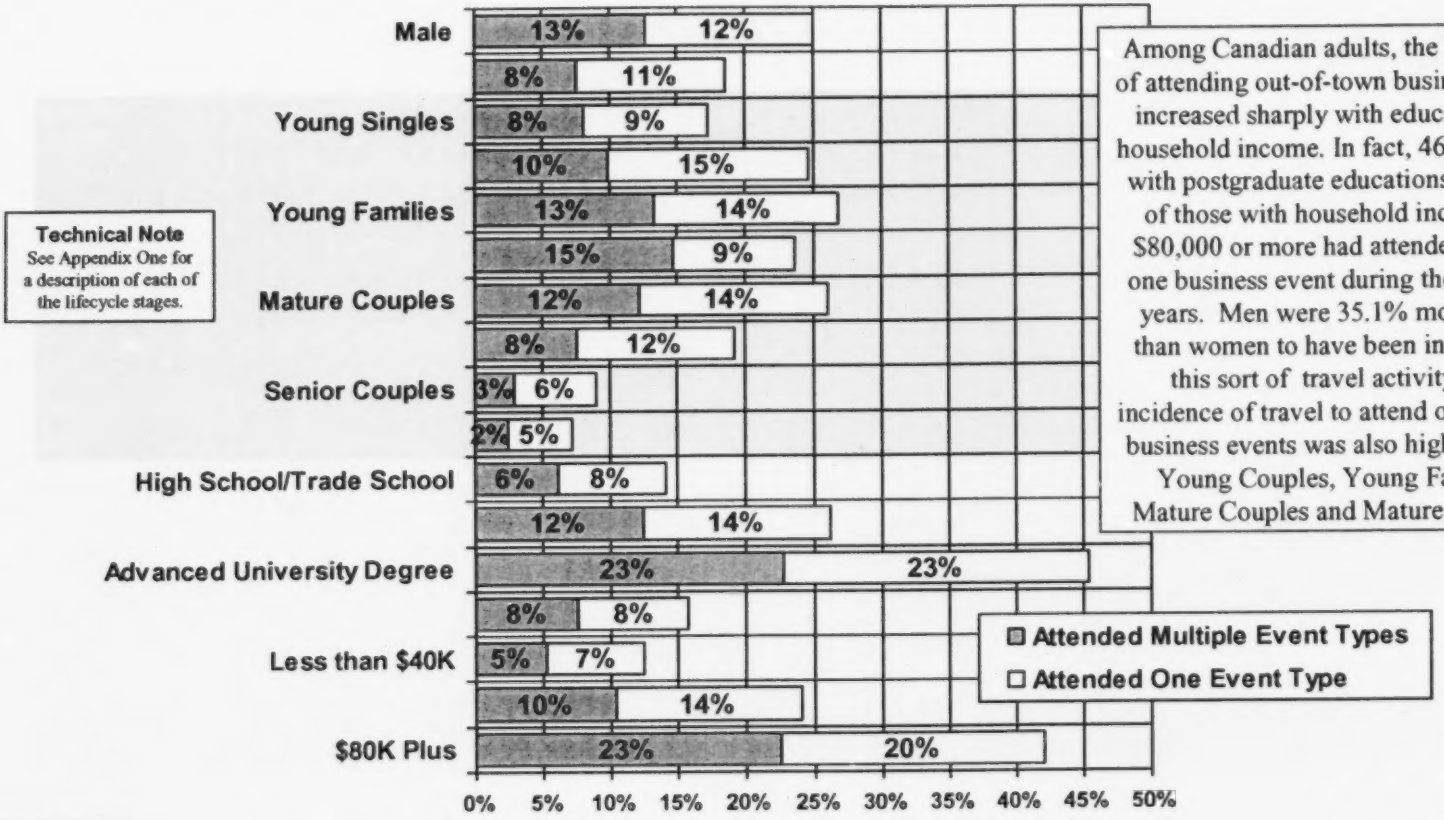

Region of Residence
South Atlantic
Florida, Georgia, North Carolina, South Carolina
14%
14%
East South Central
Alabama, Mississippi, Tennessee, Kentucky
17%
18%
West South Central
Texas, Oklahoma, Arkansas, Louisiana
15%
14%
Mountain
New Mexico, Arizona, Utah, Colorado, Nevada, Idaho, Wyoming, Montana
16%
13%
Pacific/Hawaii
California, Hawaii, Oregon, Washington, Alaska
13%
16%
West North Central
Kansas, Nebraska, South Dakota, Missouri, Iowa, Minnesota
17%
13%
East North Central
Wisconsin, Illinois, Michigan, Ohio, Indiana
14%
14%
Middle Atlantic
Pennsylvania, New York, New Jersey
12%
12%
New England
Maine, Connecticut, Massachusetts, Rhode Island, Vermont
13%
14%
0%
10%
20%
30%
40%
50%
The incidence of travel to attend out-of-town business events was relatively uniform across the nine regions of the United States. Those from the East South Central Region were slightly more likely to have attended a business event while those from the Middle Atlantic Region were slightly less likely.
Attended Multiple Event Types
Attended One Event Type

Attending Out-of-Town Business Events
By Demographics: Canada

Base: Number of event types attended:
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years

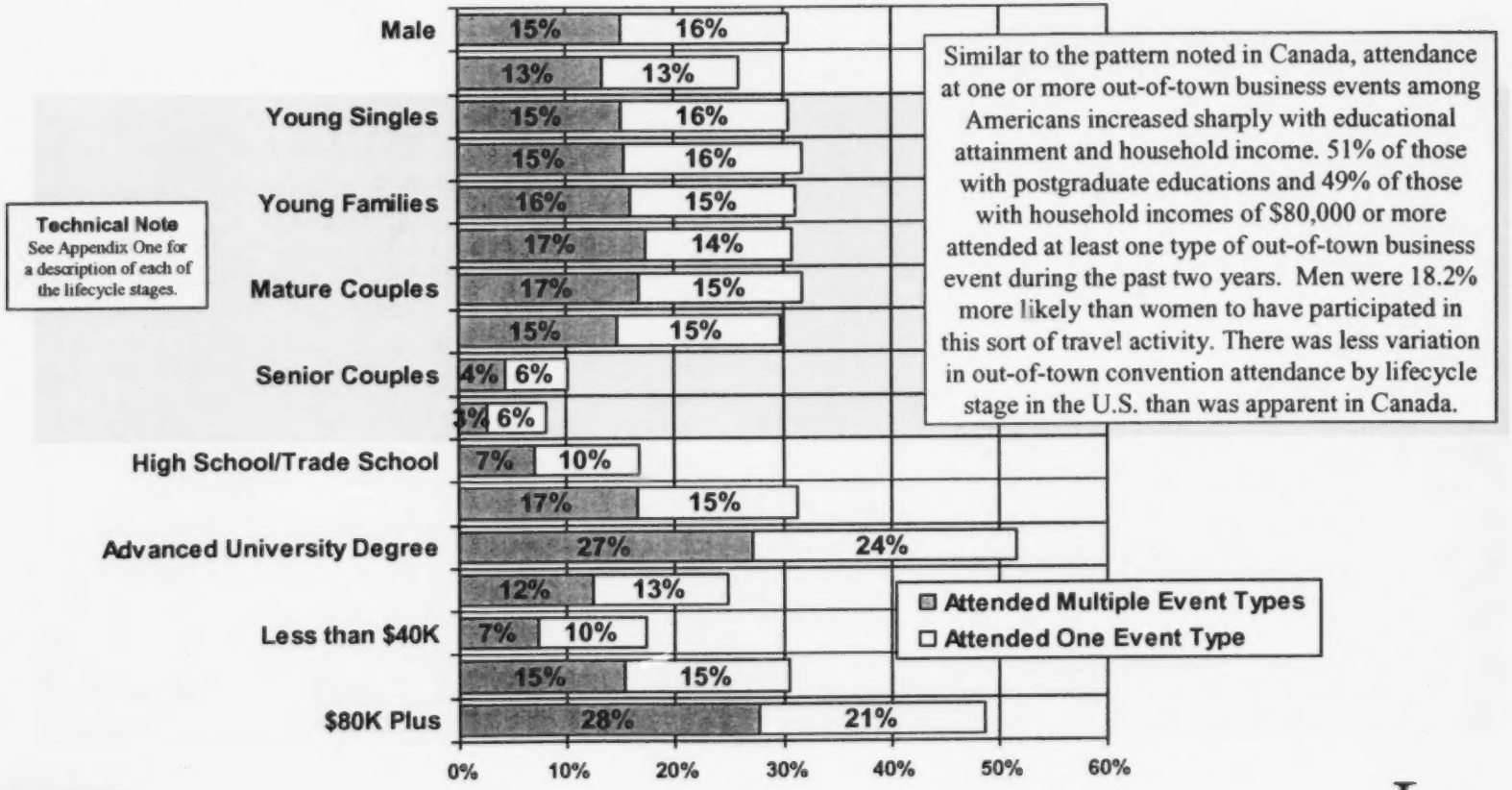


Technical Note
See Appendix One for a description of each of the lifecycle stages.

Among Canadian adults, the likelihood of attending out-of-town business events increased sharply with education and household income. In fact, 46% of those with postgraduate educations and 43% of those with household incomes of $80,000 or more had attended at least one business event during the past two years. Men were 35.1% more likely than women to have been involved in this sort of travel activity. The incidence of travel to attend out-of-town business events was also higher among Young Couples, Young Families, Mature Couples and Mature Families.

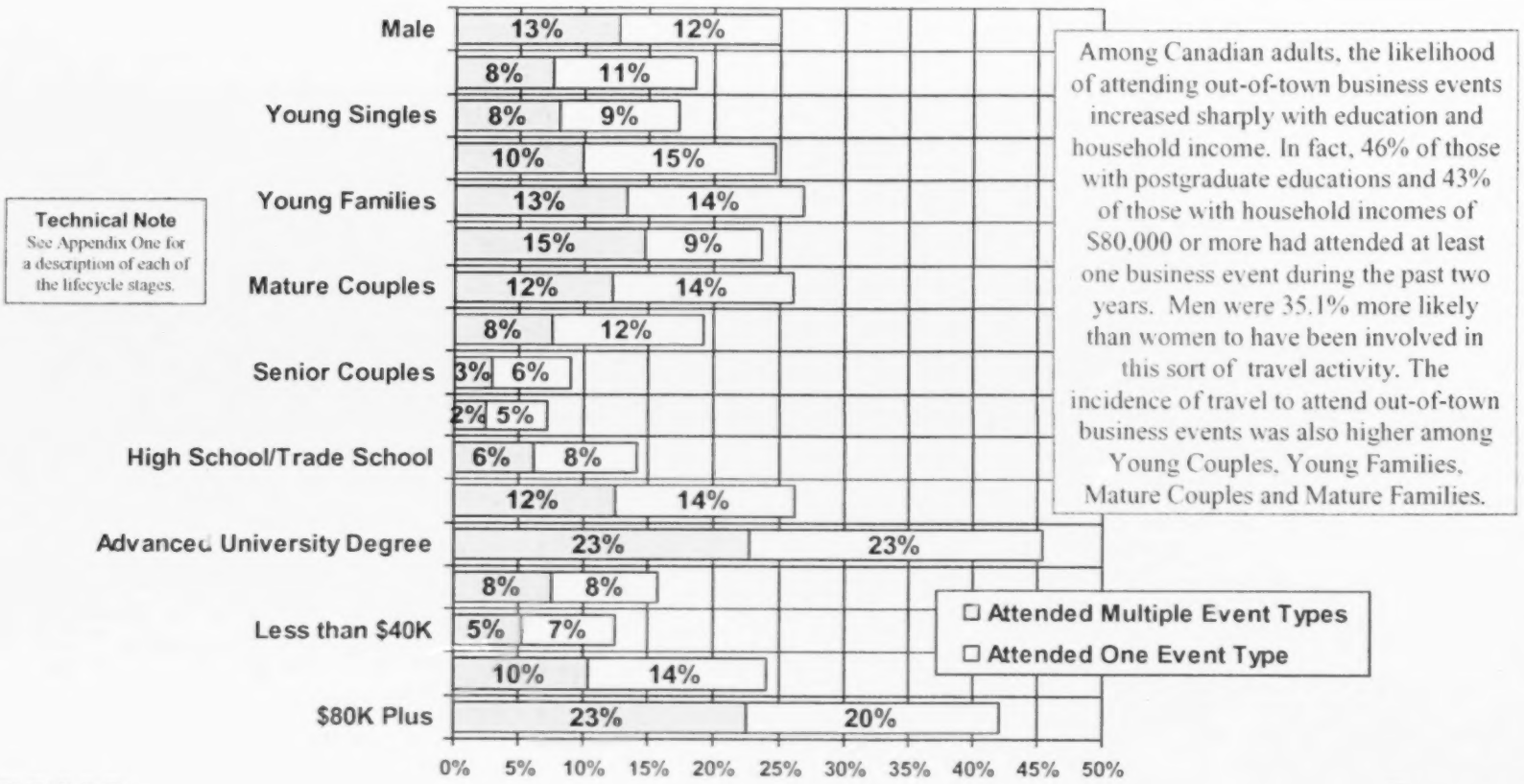
Attending Out-of-Town Business Events
By Demographics: United States

Base: Number of event types attended;
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



Technical Note
See Appendix One for a description of each of the lifecycle stages.

Similar to the pattern noted in Canada, attendance at one or more out-of-town business events among Americans increased sharply with educational attainment and household income. 51% of those with postgraduate educations and 49% of those with household incomes of $80,000 or more attended at least one type of out-of-town business event during the past two years. Men were 18.2% more likely than women to have participated in this sort of travel activity. There was less variation in out-of-town convention attendance by lifecycle stage in the U.S. than was apparent in Canada.



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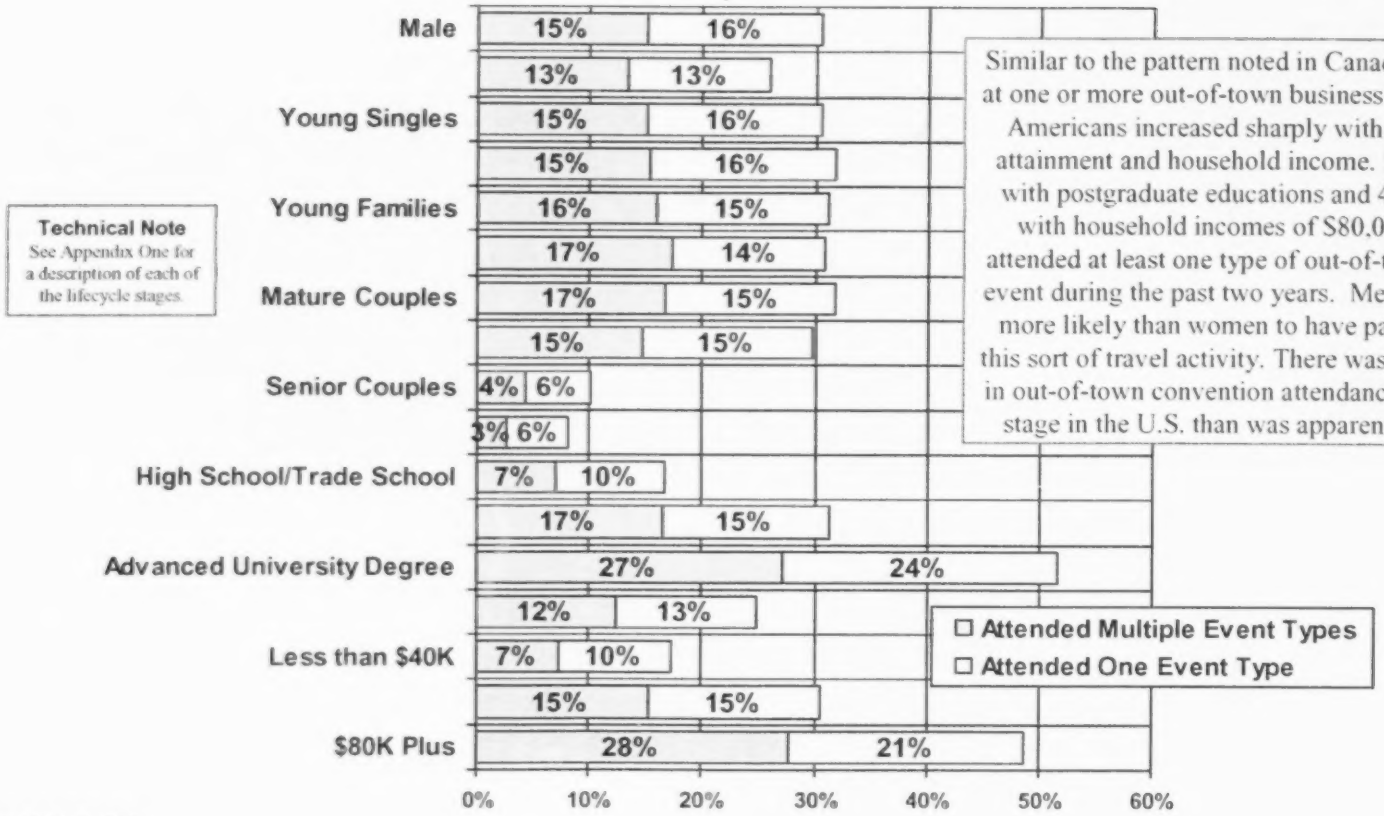

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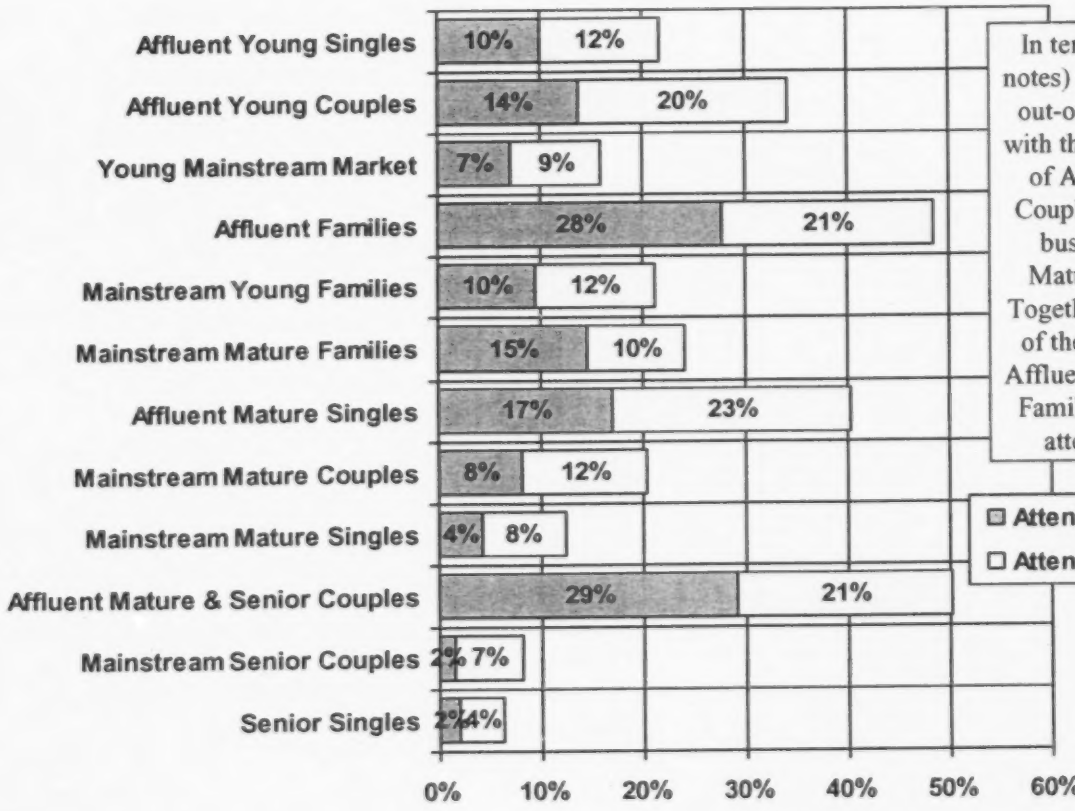
Attending Out-of-Town Business Events
By Market Segment: Canada

Base: Number of event types attended;
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years

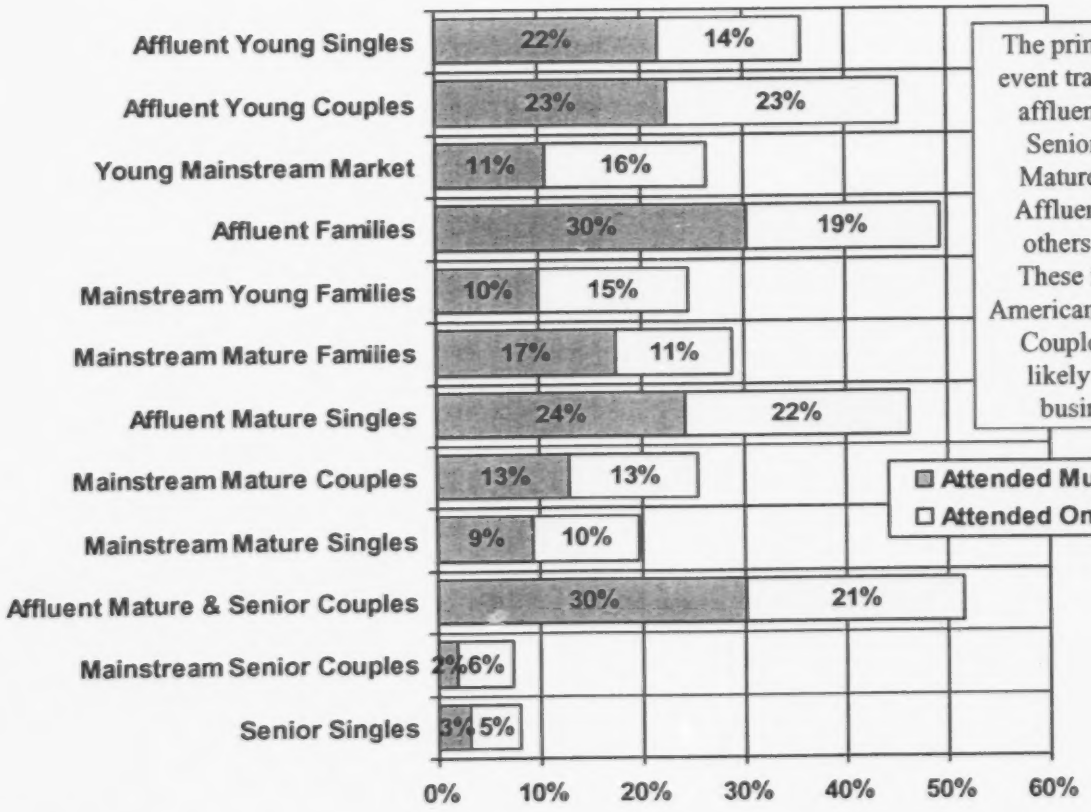


In terms of the market segments (see technical notes) in Canada, the incidence of travel to attend out-of-town business events was closely linked with the affluence and age of travellers. Members of Affluent Families and Affluent and Senior Couples comprised the prime target markets for business event travel, followed by Affluent Mature Singles and Affluent Young Couples. Together, these four segments account for 18.5% of the Canadian travel market. Members of the Affluent Mature and Senior Couples and Affluent Families segments were the most likely to have attended multiple types of business events.

Technical Note
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Attending Out-of-Town Business Events
By Market Segment: United States

Base: Number of event types attended:
percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



The prime American target markets for business event travel activities were also found among the affluent market segments. Affluent Mature & Senior Couples, Affluent Families, Affluent Mature Singles, Affluent Young Couples and Affluent Young Singles were more likely than others to attend out-of-town business events. These five segments account for 27.4% of the American travel market. Affluent Mature & Senior Couples and Affluent Families were the most likely to have attended two or more types of business events during the past two years.

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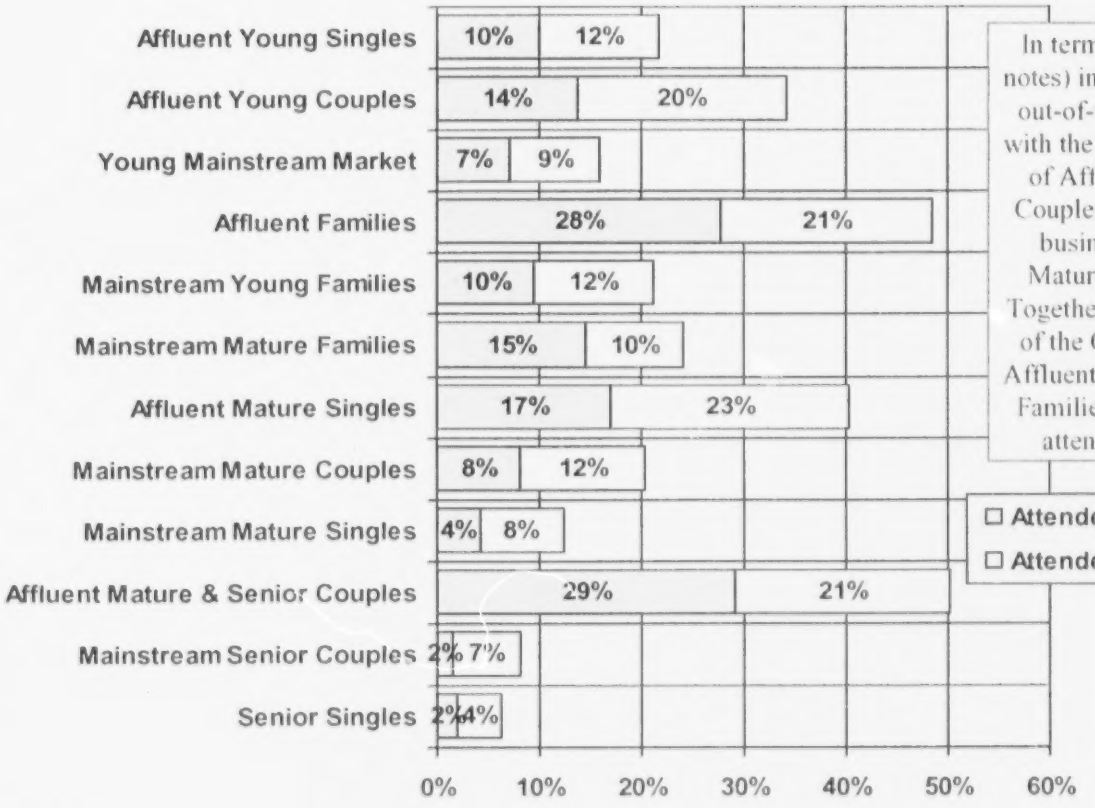

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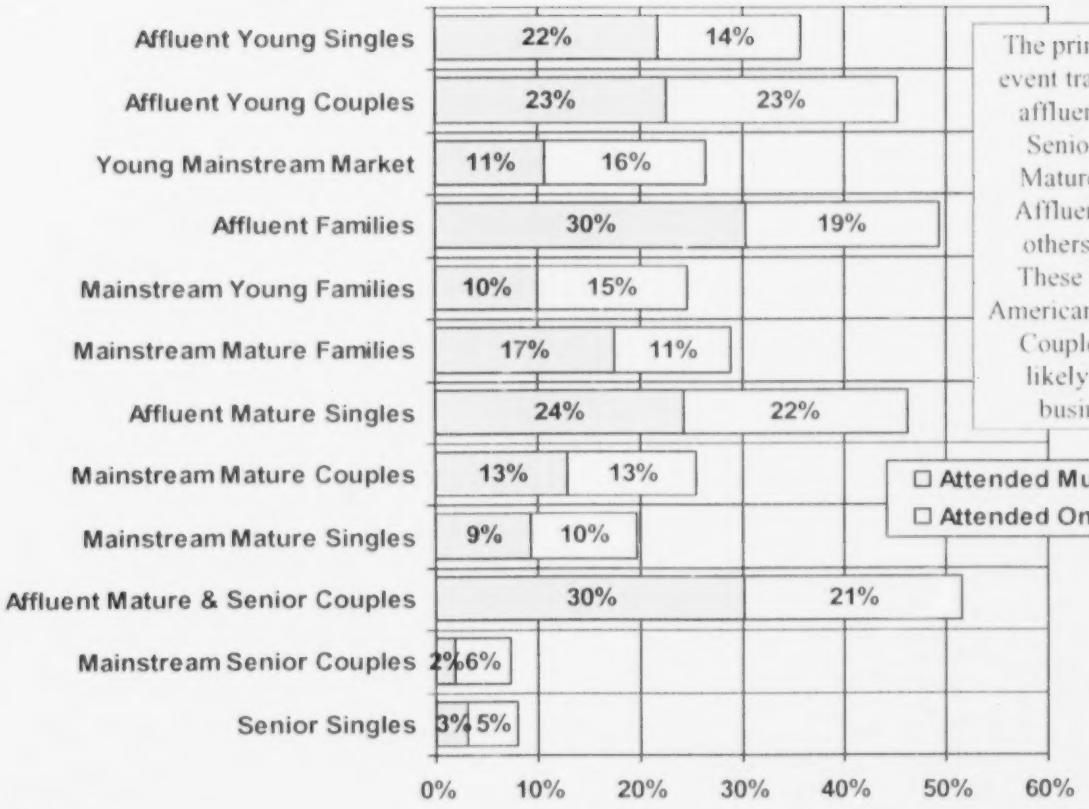

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Technical Note

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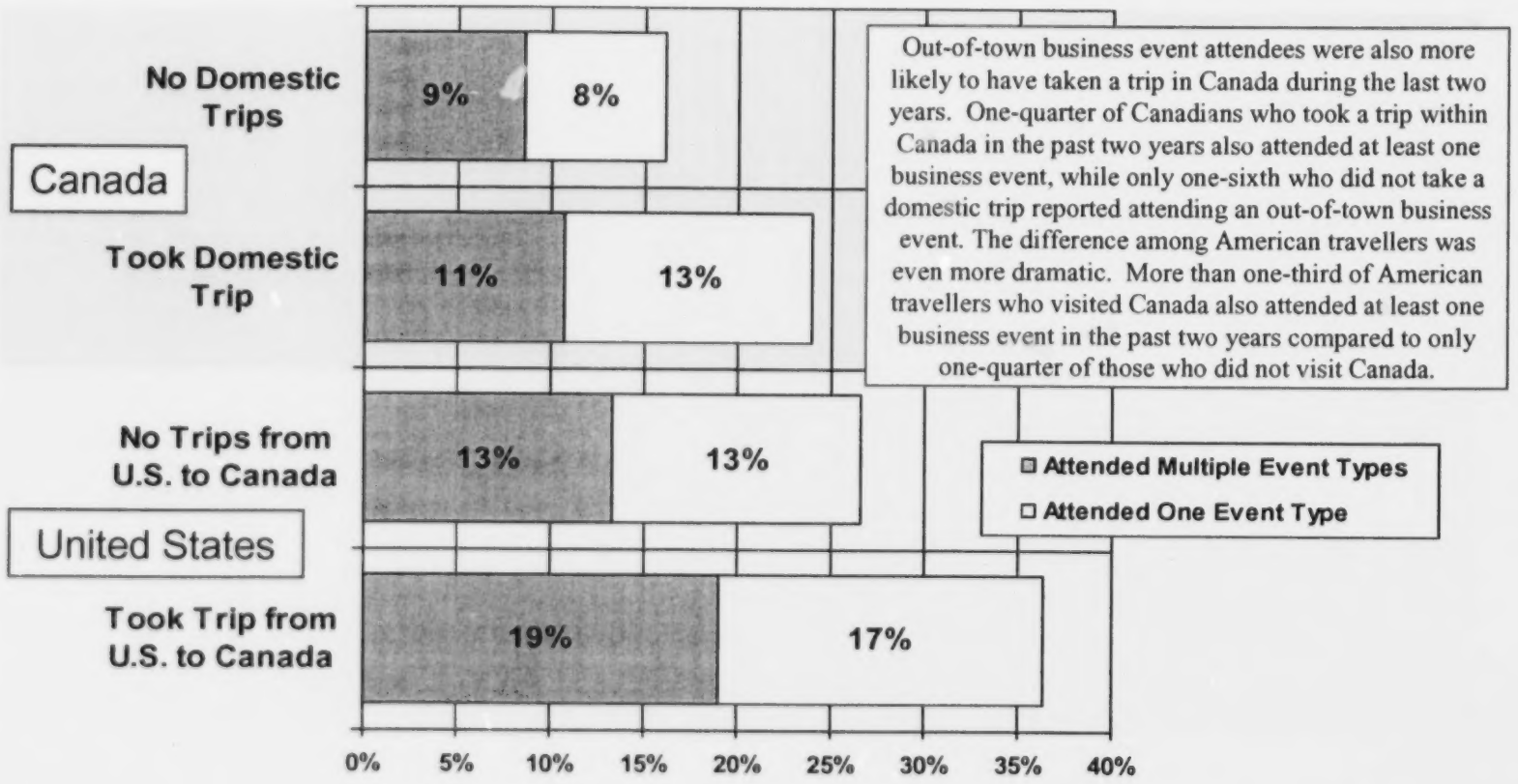
Attending Out-of-Town Business Events

Travel in Canada by Percent Taking At Least One Trip in Canada Last Two Years: Canada versus United States

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years

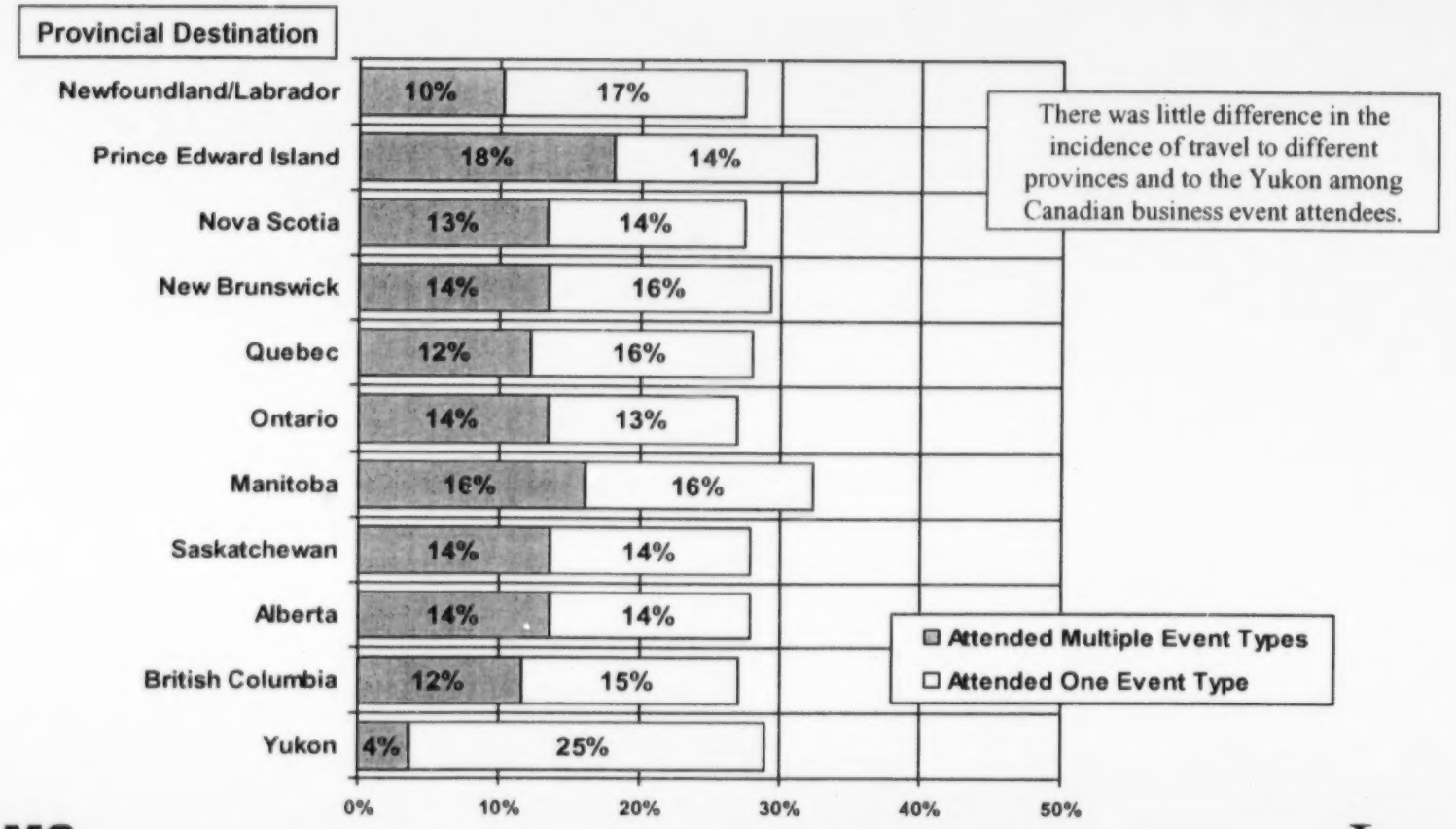


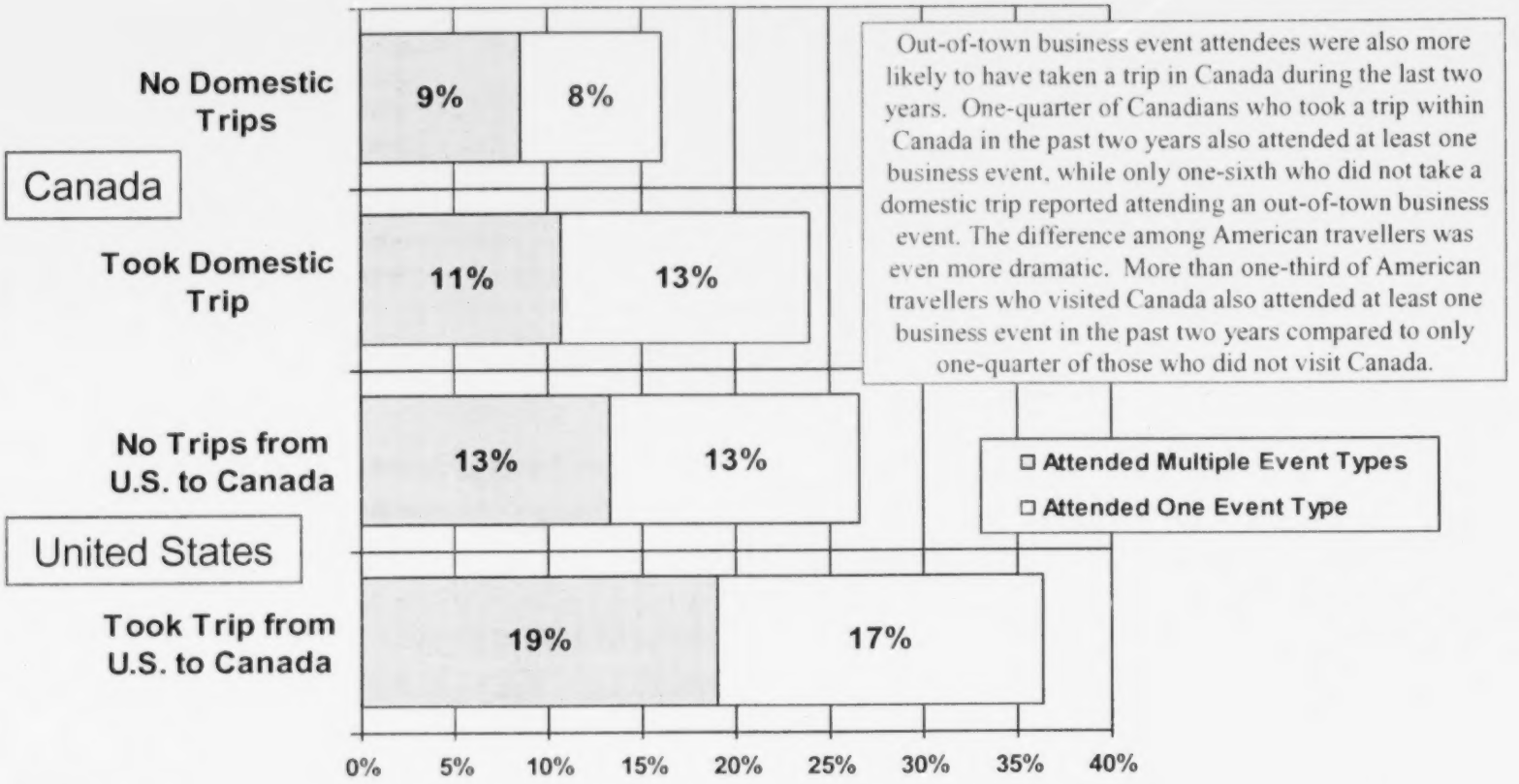
Out-of-town business event attendees were also more likely to have taken a trip in Canada during the last two years. One-quarter of Canadians who took a trip within Canada in the past two years also attended at least one business event, while only one-sixth who did not take a domestic trip reported attending an out-of-town business event. The difference among American travellers was even more dramatic. More than one-third of American travellers who visited Canada also attended at least one business event in the past two years compared to only one-quarter of those who did not visit Canada.

Attending Out-of-Town Business Events

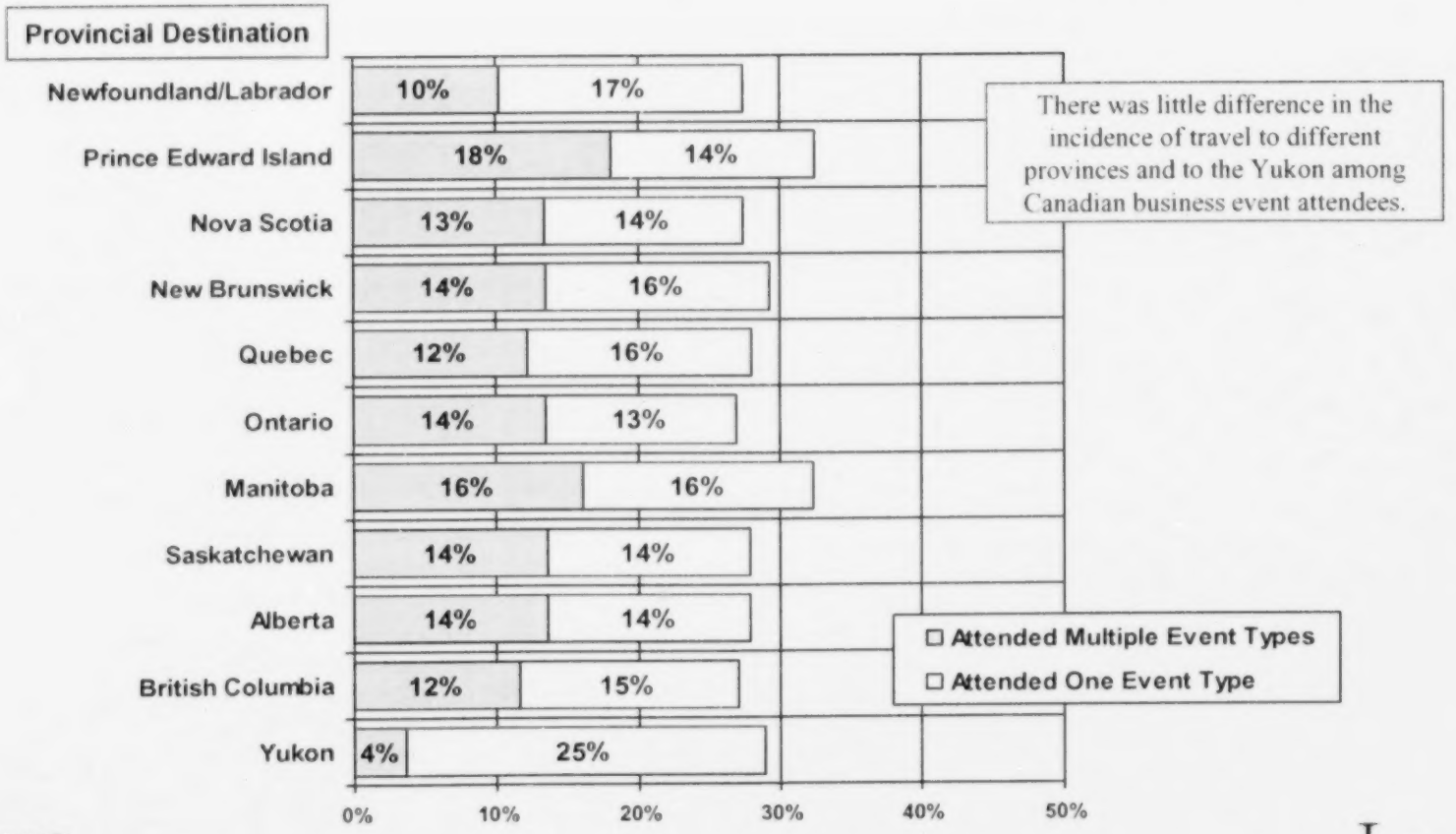
Convention Attendance by Province Travelled To: Canada

Base: Percent of population (18 plus) who took at least one trip to a province during the last two years





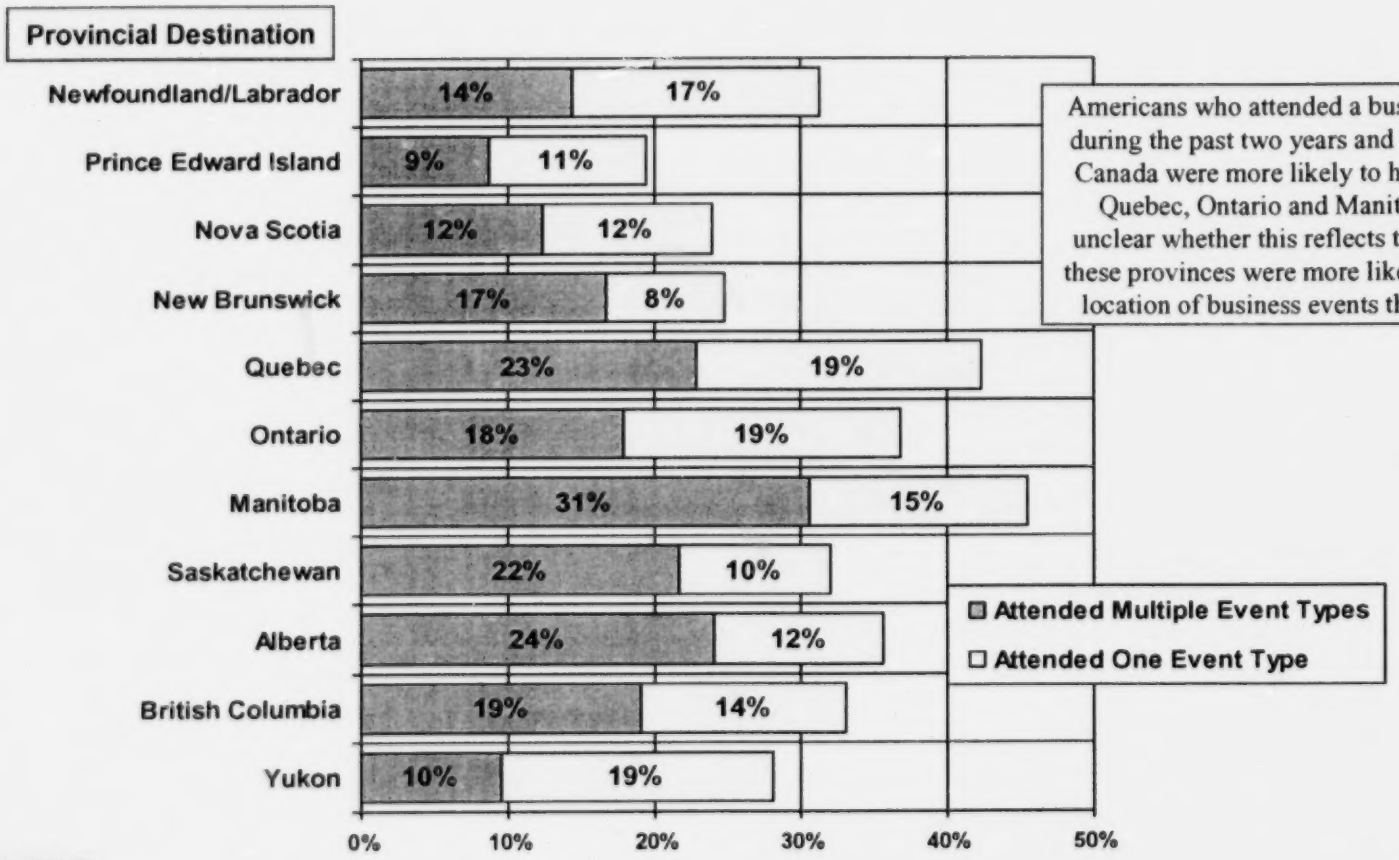
Out-of-town business event attendees were also more likely to have taken a trip in Canada during the last two years. One-quarter of Canadians who took a trip within Canada in the past two years also attended at least one business event, while only one-sixth who did not take a domestic trip reported attending an out-of-town business event. The difference among American travellers was even more dramatic. More than one-third of American travellers who visited Canada also attended at least one business event in the past two years compared to only one-quarter of those who did not visit Canada.


Provincial Destination
Newfoundland/Labrador
Prince Edward Island
Nova Scotia
New Brunswick
Quebec
Ontario
Manitoba
Saskatchewan
Alberta
British Columbia
Yukon
10%
17%
18%
14%
13%
14%
14%
16%
12%
16%
14%
13%
16%
16%
14%
14%
14%
14%
12%
15%
4%
25%
0%
10%
20%
30%
40%
50%
There was little difference in the incidence of travel to different provinces and to the Yukon among Canadian business event attendees.
Attended Multiple Event Types
Attended One Event Type

Attending Out-of-Town Business Events

Convention Attendance by Province Travelled To: United States

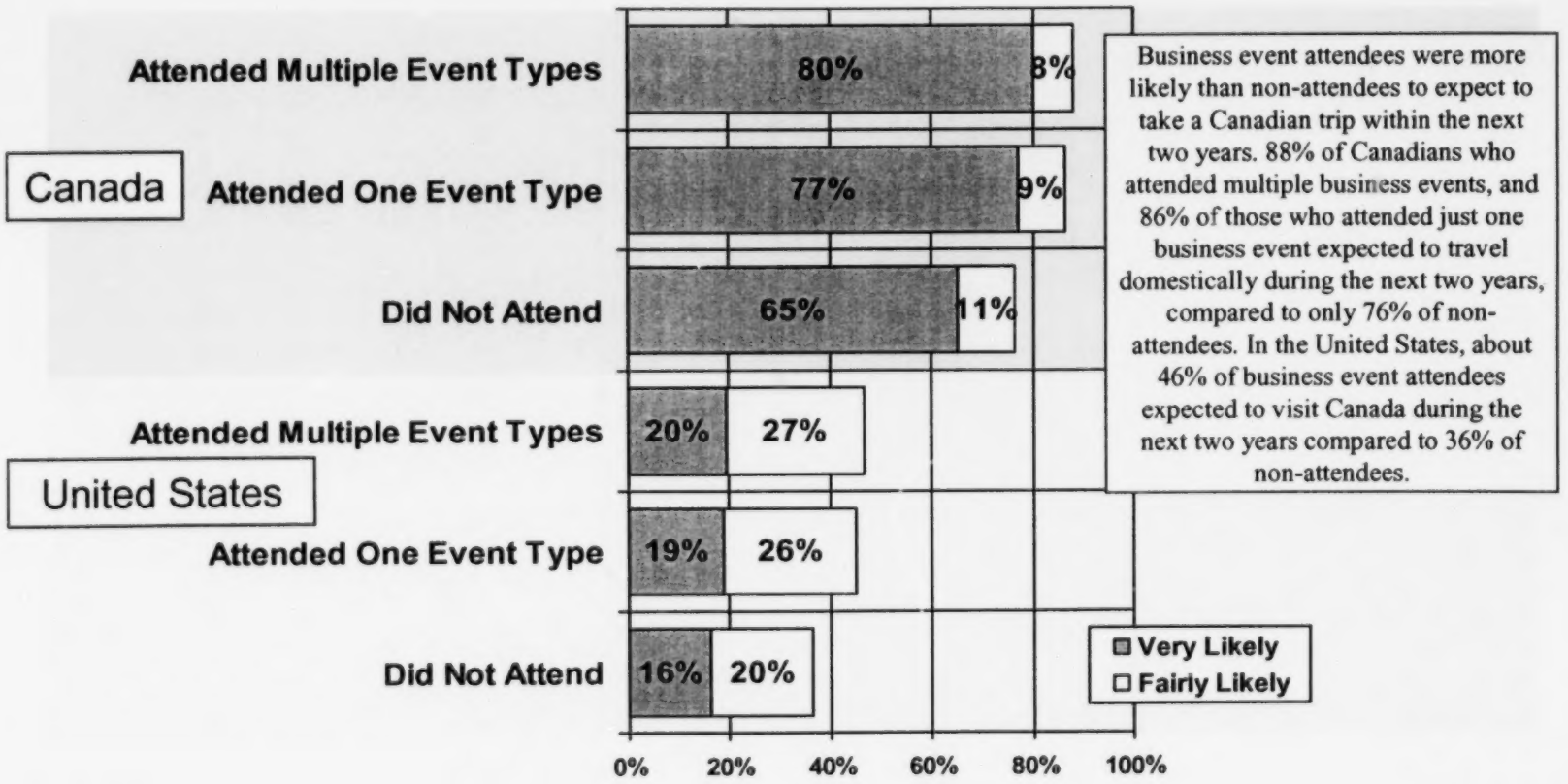
Base: Percent of population (18 plus) who took at least one trip to a province during the last two years



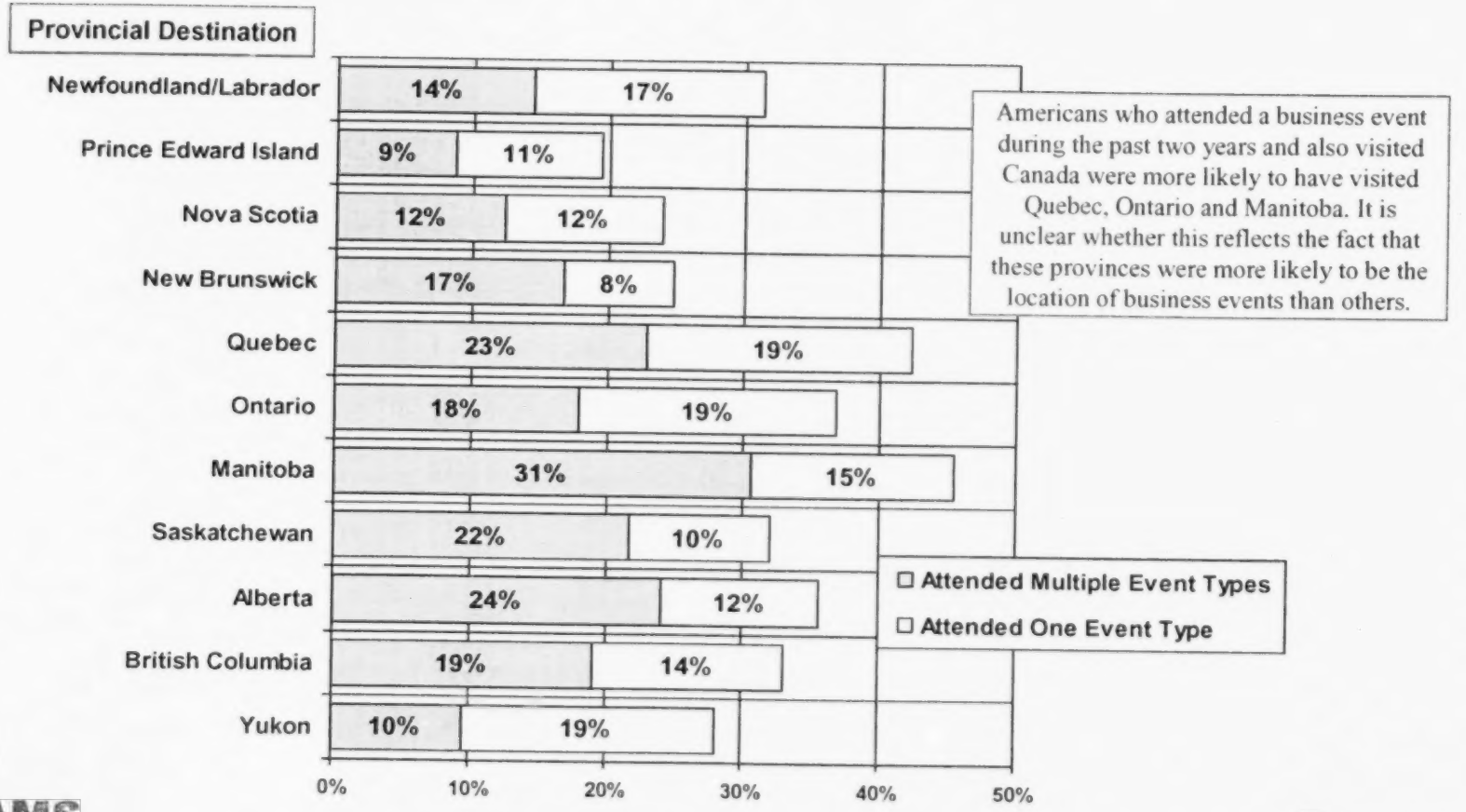
Americans who attended a business event during the past two years and also visited Canada were more likely to have visited Quebec, Ontario and Manitoba. It is unclear whether this reflects the fact that these provinces were more likely to be the location of business events than others.

Attending Out-of-Town Business Events
Convention Attendance
by Intentions to Travel in Canada during Next Two Years

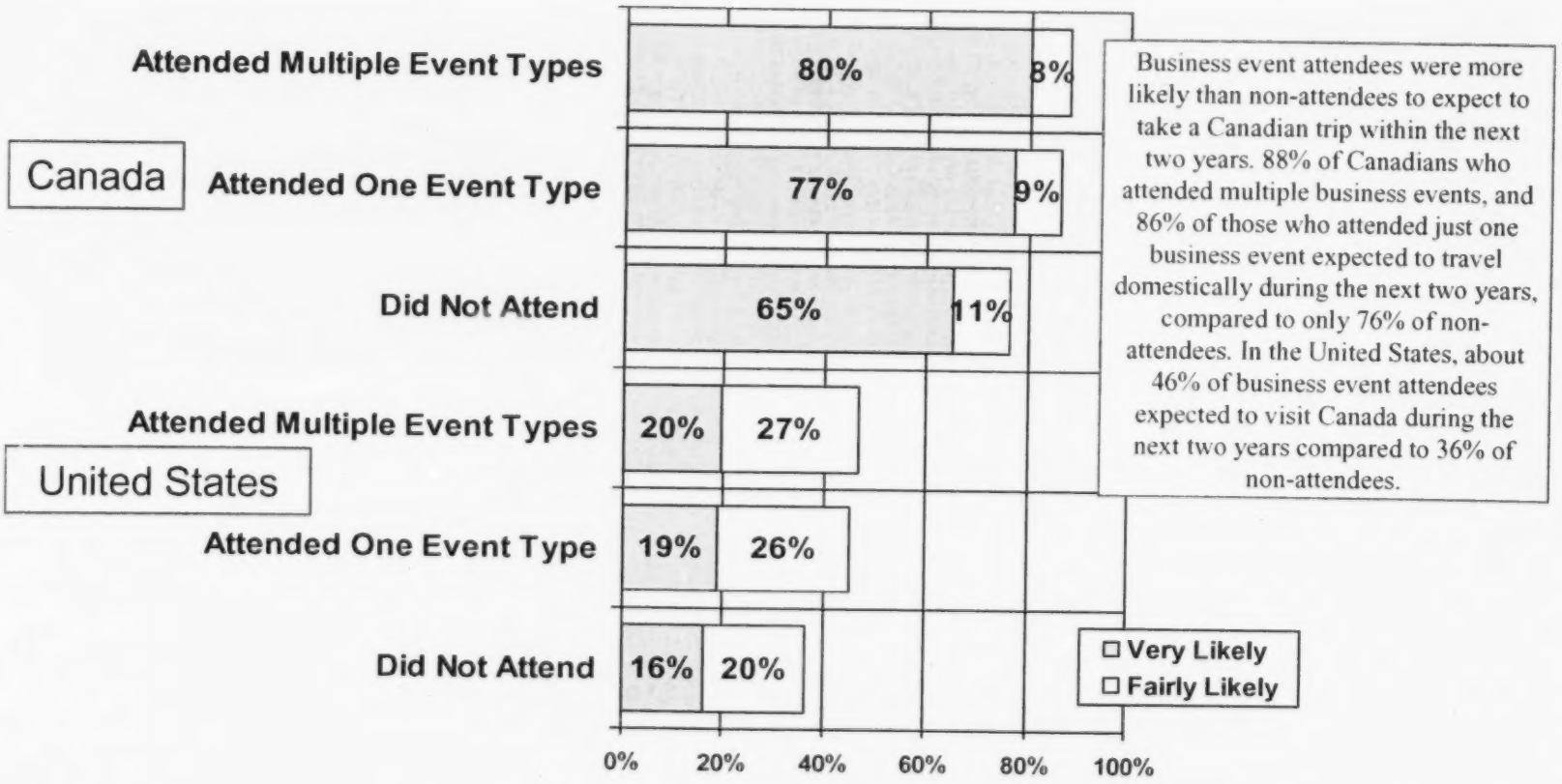
Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



Business event attendees were more likely than non-attendees to expect to take a Canadian trip within the next two years. 88% of Canadians who attended multiple business events, and 86% of those who attended just one business event expected to travel domestically during the next two years, compared to only 76% of non-attendees. In the United States, about 46% of business event attendees expected to visit Canada during the next two years compared to 36% of non-attendees.



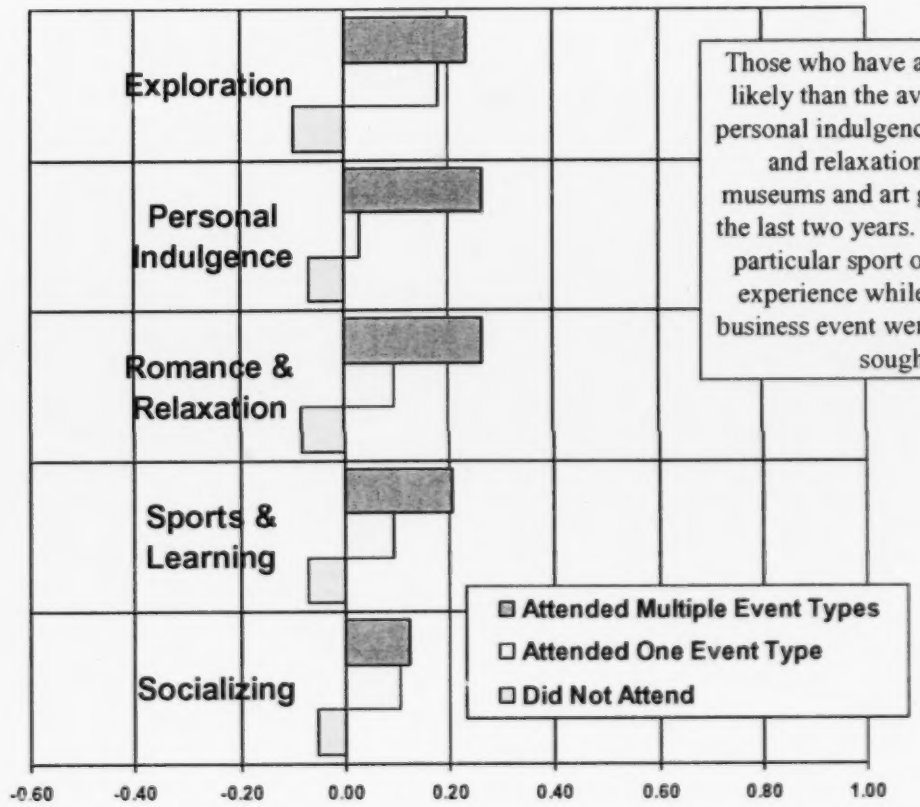
Americans who attended a business event during the past two years and also visited Canada were more likely to have visited Quebec, Ontario and Manitoba. It is unclear whether this reflects the fact that these provinces were more likely to be the location of business events than others.


Attended Multiple Event Types
80%
8%
Canada
Attended One Event Type
77%
9%
Did Not Attend
65%
11%
Attended Multiple Event Types
20%
27%
United States
Attended One Event Type
19%
26%
Did Not Attend
16%
20%
Very Likely
Fairly Likely
0%
20%
40%
60%
80%
100%
Business event attendees were more likely than non-attendees to expect to take a Canadian trip within the next two years. 88% of Canadians who attended multiple business events, and 86% of those who attended just one business event expected to travel domestically during the next two years, compared to only 76% of non-attendees. In the United States, about 46% of business event attendees expected to visit Canada during the next two years compared to 36% of non-attendees.

Attending Out-of-Town Business Events

General Vacation Experiences Sought during Pleasure Travel in the Past Two Years

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



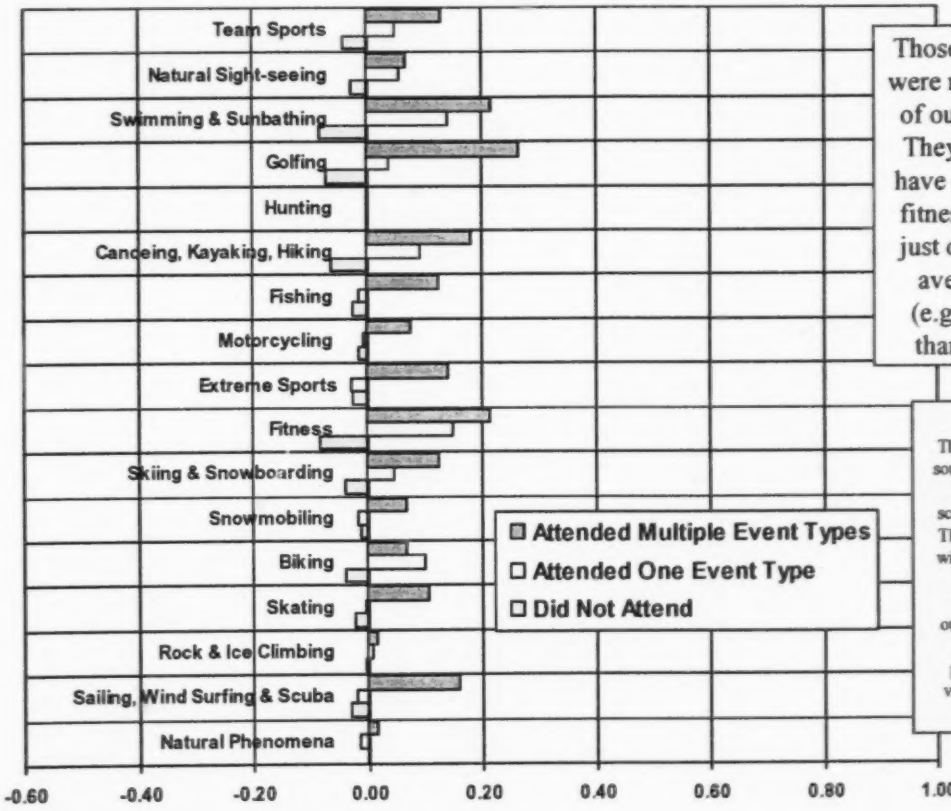
Those who have attended several types of business events were more likely than the average traveller to have sought out opportunities for personal indulgence (e.g., enjoying fine dining and nightlife), romance and relaxation, and exploration (e.g., visiting historical sites, museums and art galleries, natural wonders) while on vacation during the last two years. They were also more likely to have participated in a particular sport or hobby, or to have sought out a hands-on learning experience while on vacation. Those who attended just one type of business event were also more likely than the average traveller to have sought out exploratory vacation experiences.

Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Attending Out-of-Town Business Events
Outdoor Activities Sought
during Pleasure Travel in the Past Two Years

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



Those who attended multiple types of business events were more likely to have participated in a wide variety of outdoor activities relative to the average traveller. They were especially likely to have gone golfing, to have sunbathed and swam, or to have worked out in a fitness center or jogged outside. Those who attended just one type of business event also exhibited above-average participation in similar outdoor activities (e.g., swimming & sunbathing, fitness), but less so than those who attended multiple business events.

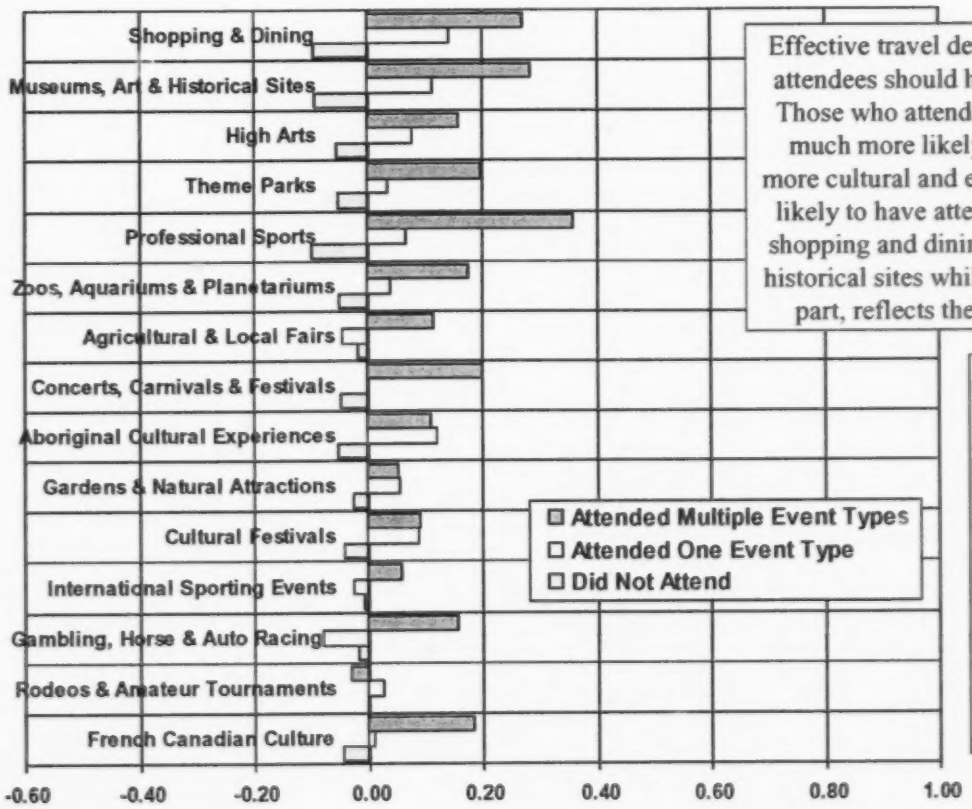
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given outdoor vacation activity type. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the outdoor vacation activity type. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the outdoor vacation activity type.

Attending Out-of-Town Business Events

Cultural and Entertainment Activities Sought during Pleasure Travel in the Past Two Years

Base: Total population (18 plus) who took a trip in the last two years. Canada & U.S. (mailback survey)



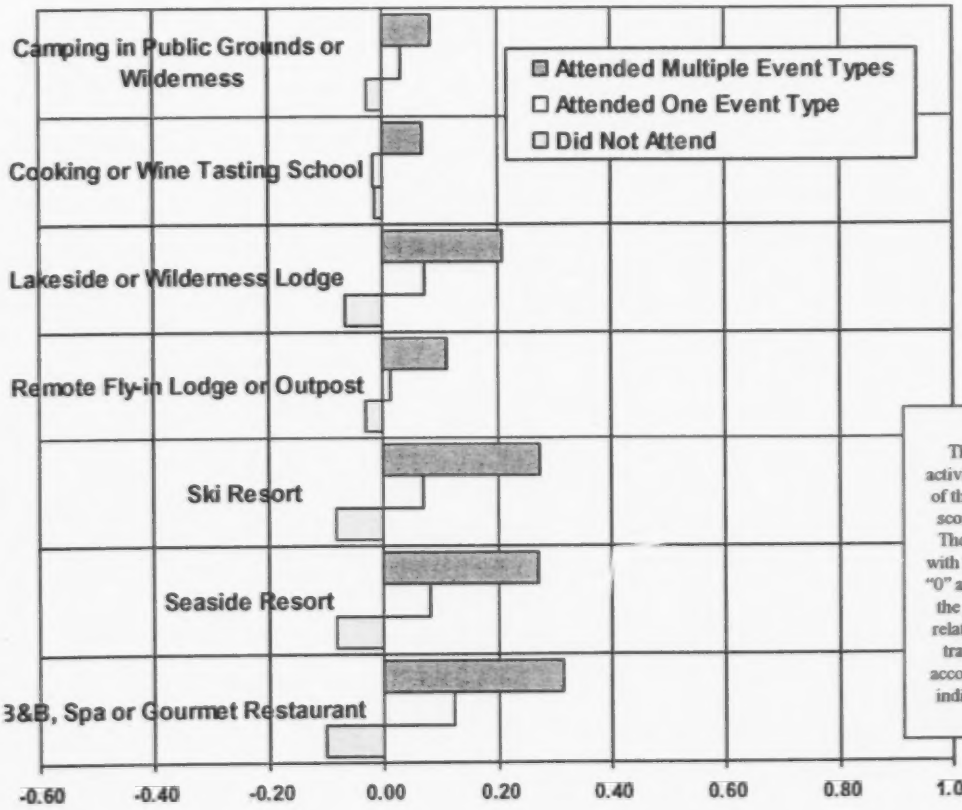
Effective travel destination promotion directed at business event attendees should highlight cultural and entertainment offerings. Those who attended two or more types of business events were much more likely than the average traveller to have attended more cultural and entertainment attractions. They were especially likely to have attended professional sports events, to have gone shopping and dining, and to have visited museums, galleries and historical sites while travelling during the past two years. This, in part, reflects the high affluence of business event attendees.

Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given cultural and entertainment vacation activity type. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the cultural and entertainment activity type. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the cultural and entertainment activity type.

Attending Out-of-Town Business Events
Accommodation-related Activities Sought during Pleasure Travel in the Past Two Years

Base: Total population (18 plus) who took a trip in the last two years. Canada & U.S. (mailback survey)



Travellers who attended two or more types of out-of-town business events were more likely to have stayed in luxury accommodations (e.g., ski and seaside resorts, B&B, spa or gourmet restaurant with accommodations, lakeside or wilderness lodges) than the average traveller during the past two years. However, they were no more likely to have stayed in natural settings (camping, remote lodge or outpost) than the average traveller.

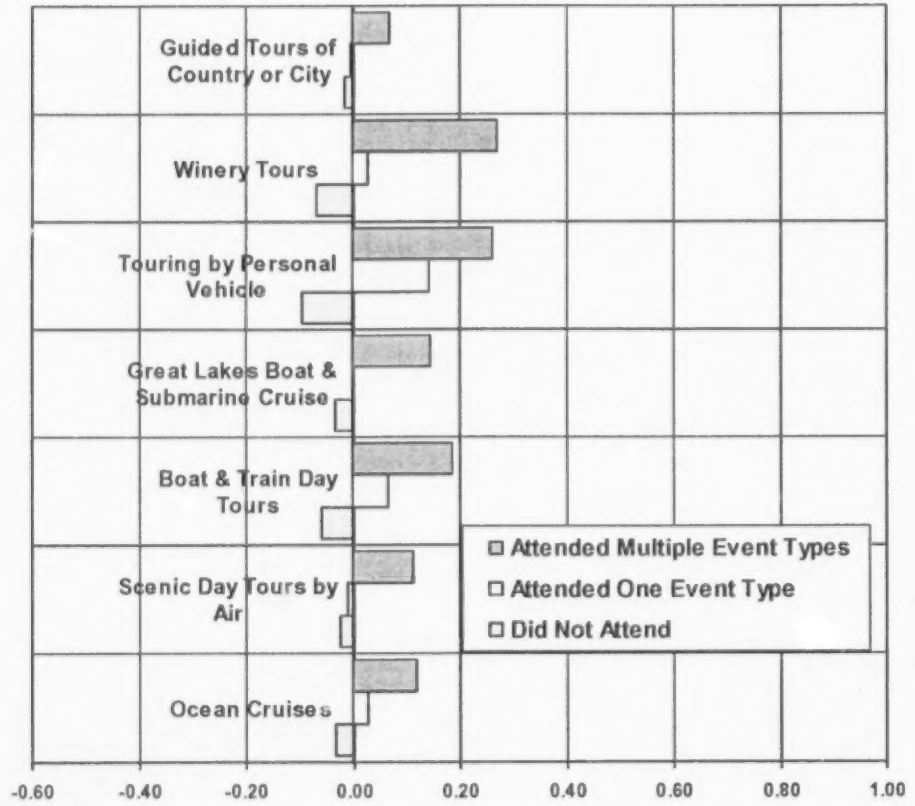
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given accommodation-related vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the accommodation-related vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the accommodation-related vacation activity.

Attending Out-of-Town Business Events

Day and Overnight Touring Activities Sought in the Past Two Years

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



Participation in day and overnight touring activities while travelling generally increased as the level of attendance at out-of-town business events increased. Those who attended several types of out-of-town business events were much more likely than others to have taken wine tours, tours by boat or train, and to have toured using a personal vehicle. Those who attended just one type of business event also were more likely than average to have toured using their own vehicle.

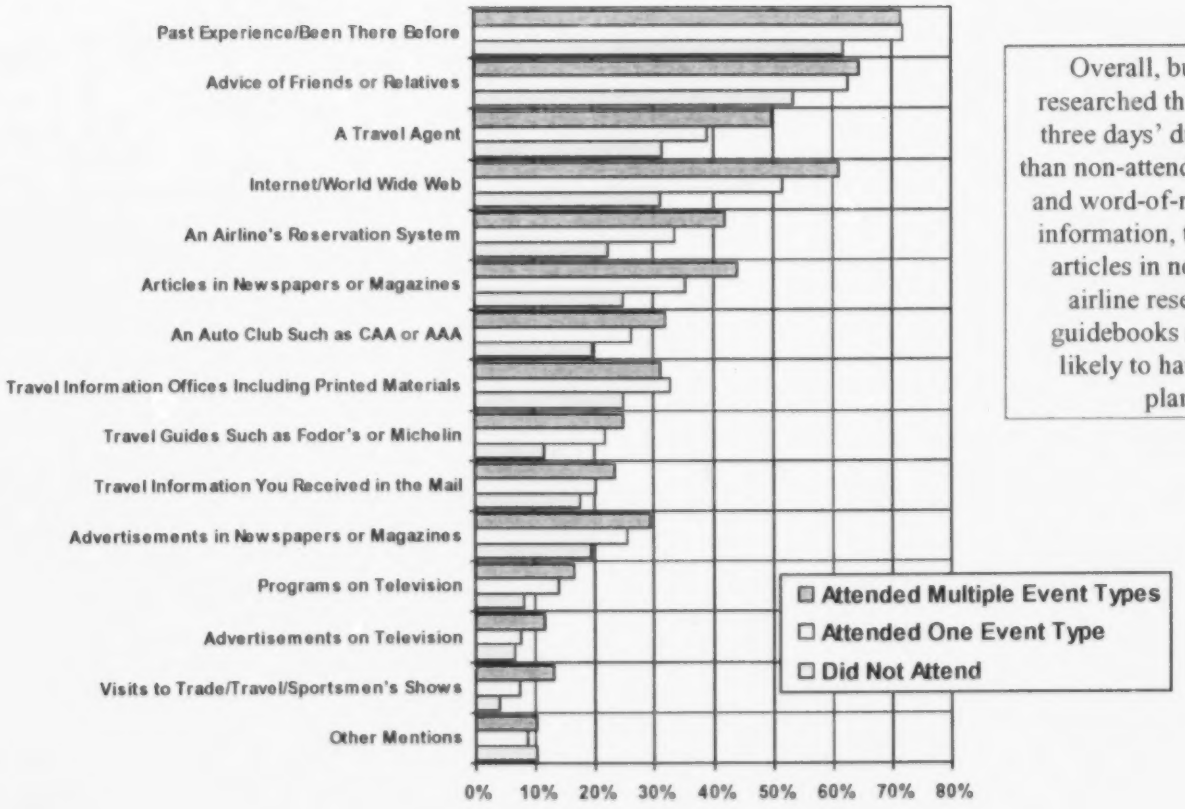
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to have participated in a given type of touring activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have participated in a given type of touring activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have participated in a given type of touring activity.

Attending Out-of-Town Business Events

Sources of Information Consulted to Plan Brief Vacations

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)

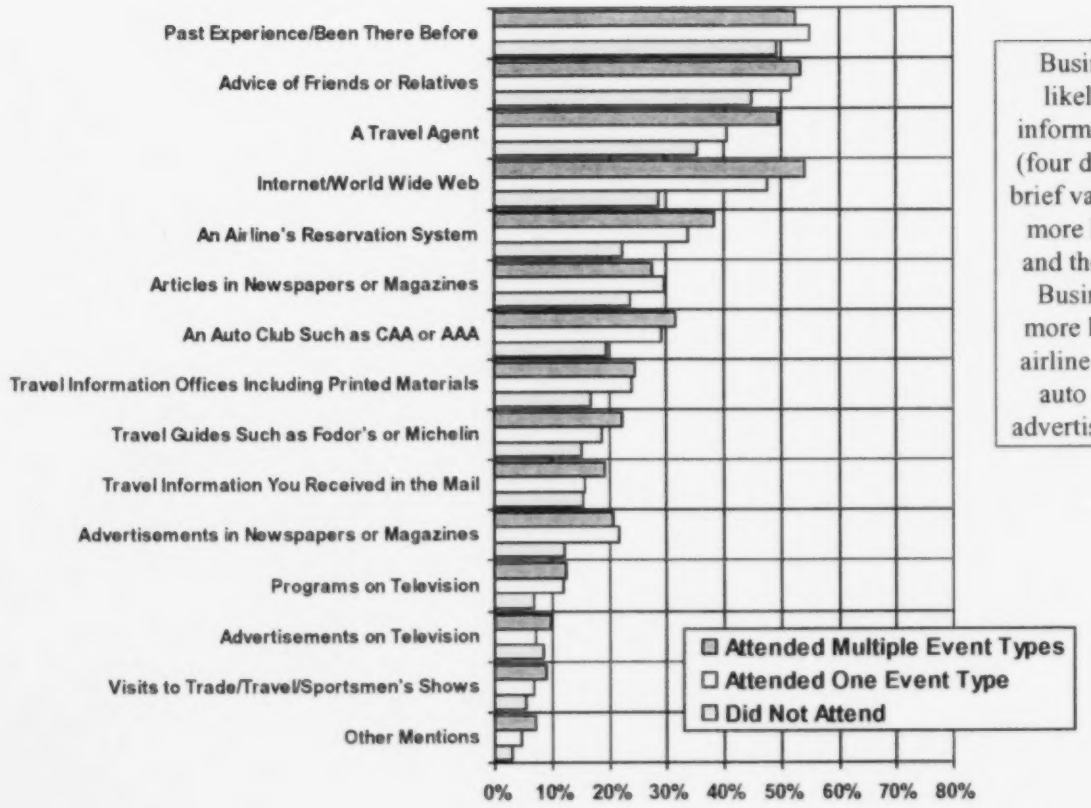


Overall, business event attendees researched their brief vacations (one to three days' duration) more extensively than non-attendees. While past experience and word-of-mouth were key sources of information, the Internet, travel agents, articles in newspapers or magazines, airline reservation systems, travel guidebooks and auto clubs were also likely to have been consulted when planning brief trips.

Attending Out-of-Town Business Events

Sources of Information Consulted to Plan Longer Vacations

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



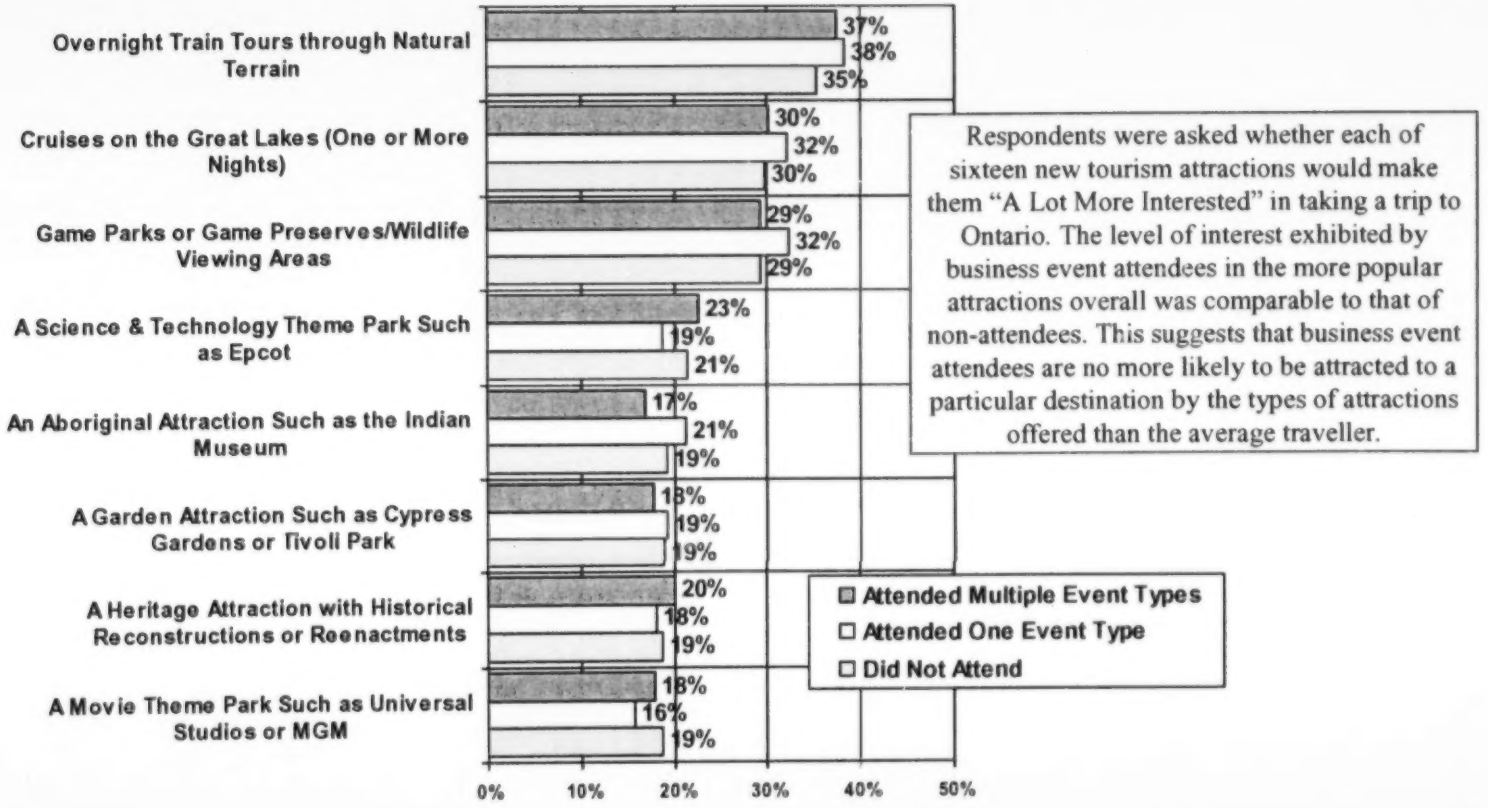
Business event attendees were also more likely to have consulted a wide range of information sources to plan their longer trips (four days or more). However, in contrast to brief vacations, business event attendees were more likely to have consulted travel agents and the Internet when planning longer trips. Business event attendees also were much more likely than others to have relied on an airline reservation system, information from auto clubs, and newspaper and magazine advertisements to help them plan longer trips.

Attending Out-of-Town Business Events

Interest in New Tourism Products (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



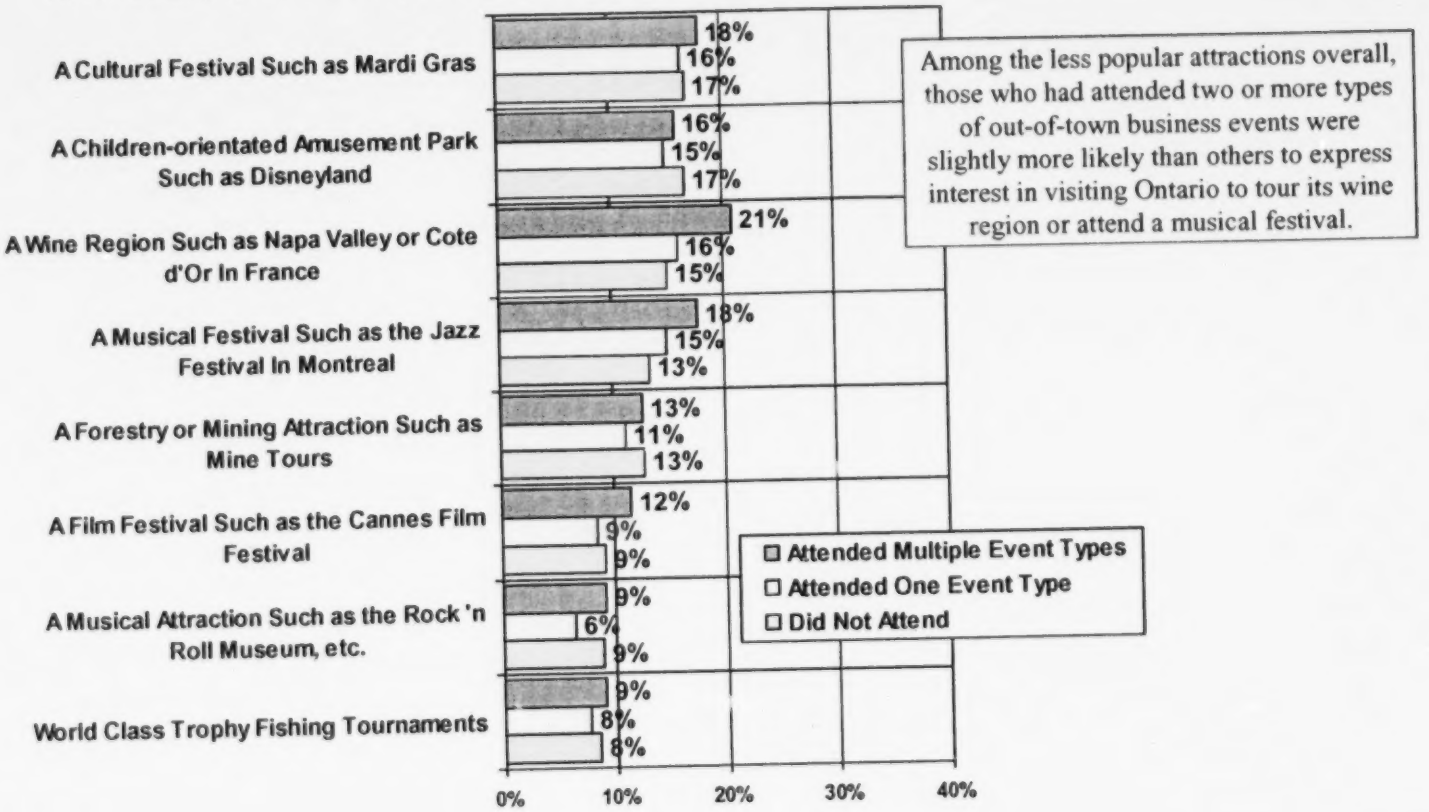
Respondents were asked whether each of sixteen new tourism attractions would make them "A Lot More Interested" in taking a trip to Ontario. The level of interest exhibited by business event attendees in the more popular attractions overall was comparable to that of non-attendees. This suggests that business event attendees are no more likely to be attracted to a particular destination by the types of attractions offered than the average traveller.

Attending Out-of-Town Business Events

Interest in New Tourism Products (Part Two of Two)

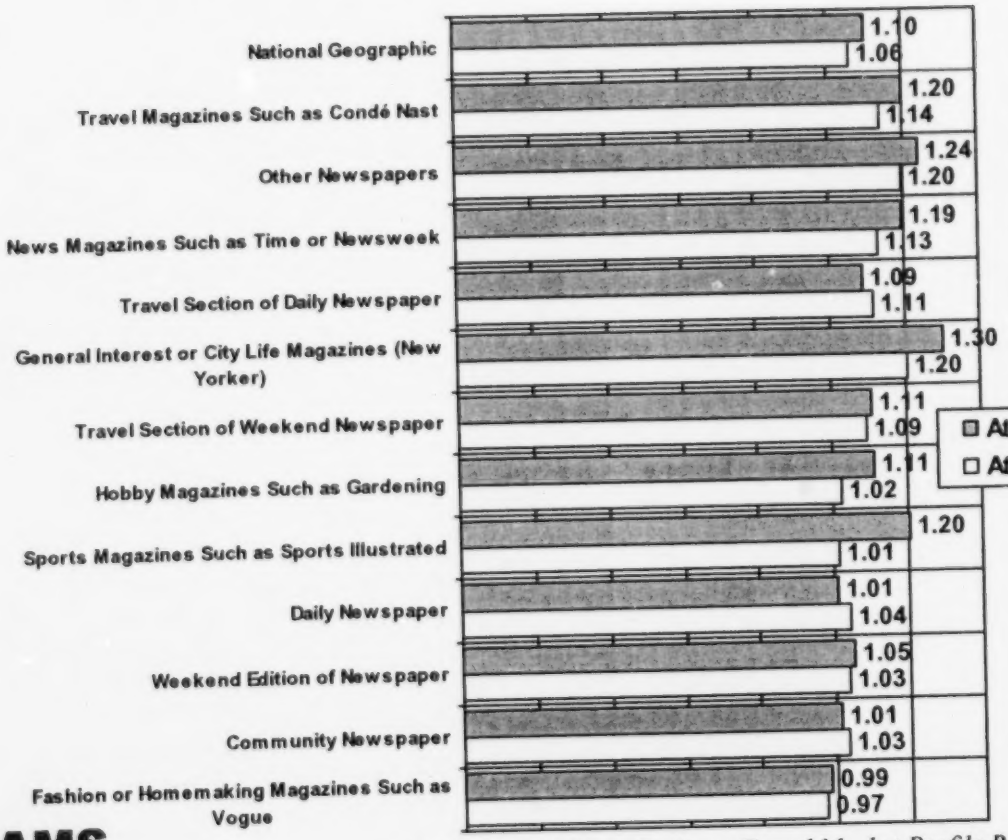
Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



Attending Out-of-Town Business Events
Media Index for Print Media: Canada & United States
Percent Reading Each Type of Publication in General Market among Those Attending One or More Event Types

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



Media indexing for types of print media (see Technical Note below) suggests that business event attendees can be best reached through general interest or city life magazines (e.g., New Yorker or Harper's), travel magazines (e.g., Travel and Leisure, National Geographic), and sports magazines and news magazines (such as Time).

Technical Note

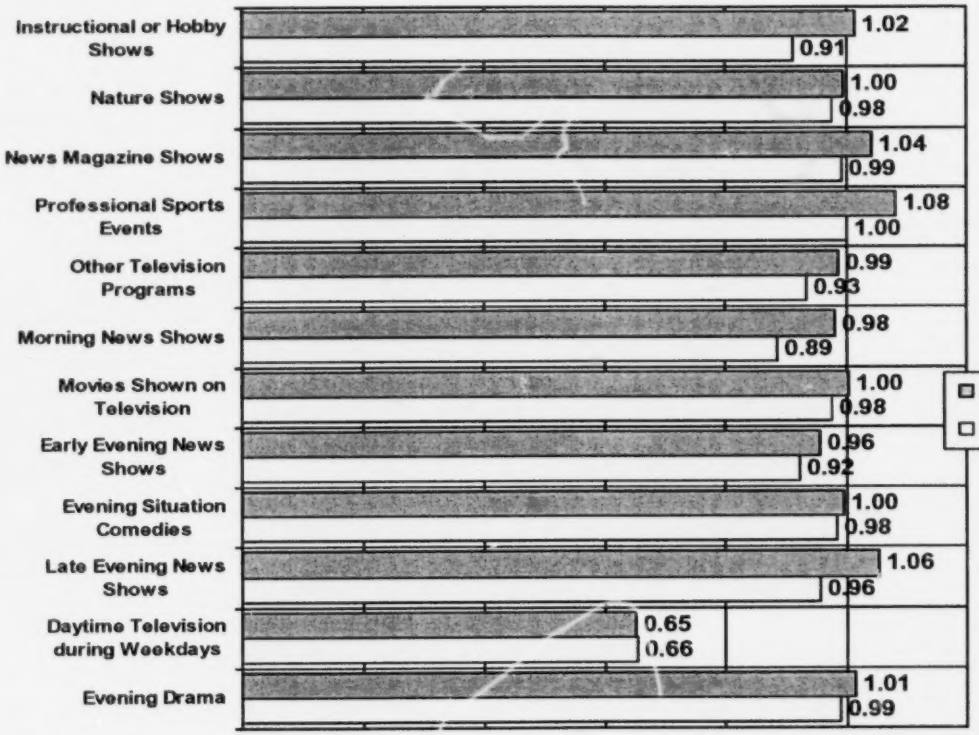
The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that out-of-town convention attendees were 20% more likely to read a particular publication than the general adult population.

Attending Out-of-Town Business Events

Media Index for Television Programs: Canada & United States

Percent Watching Each Type of Television Program in General Market among Those Attending One or More Event Types

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



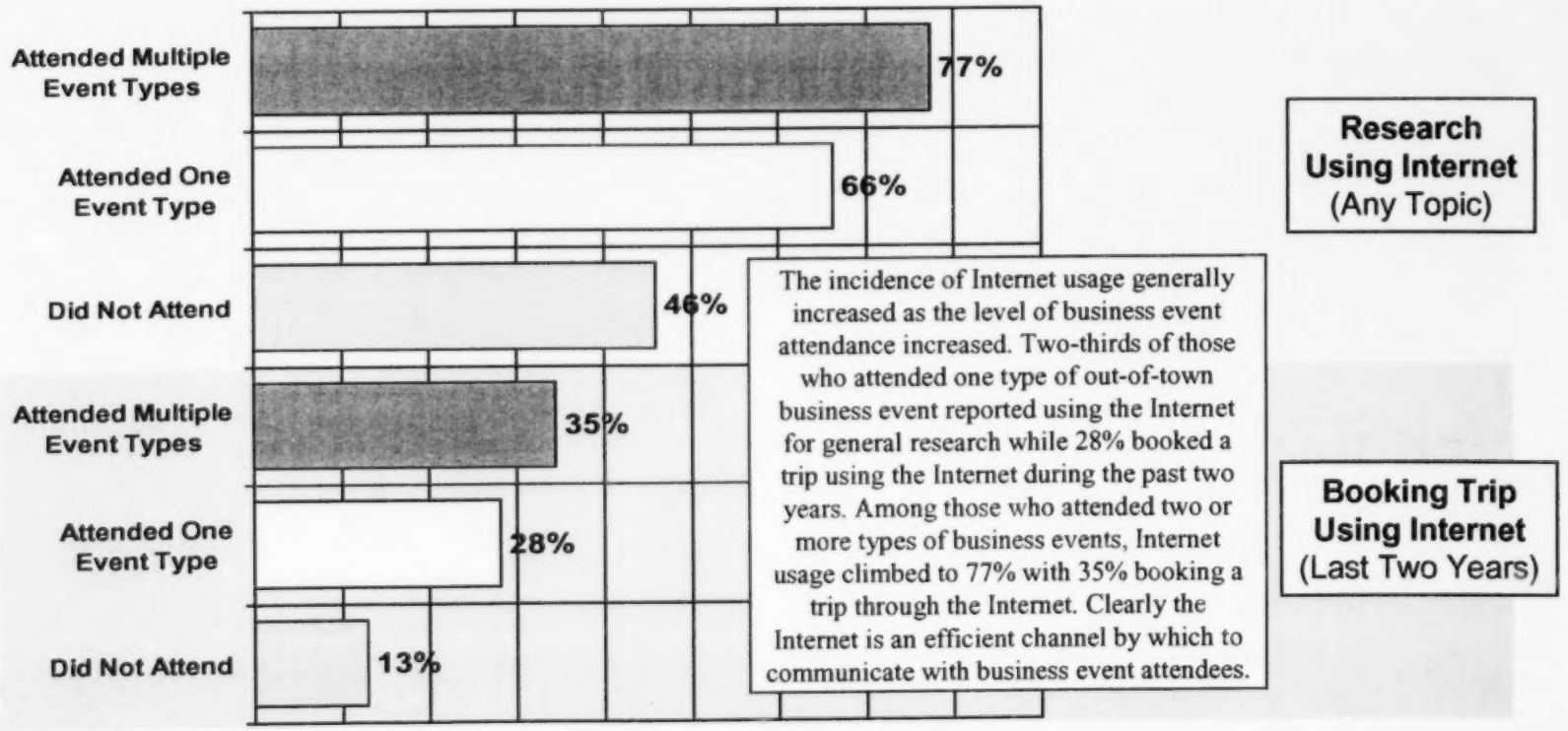
Television does not appear to be a very efficient channel by which to target business event attendees. Business event attendees were no more likely than the average traveller to watch most types of television programming. Moreover, because those who attend business events were employed full-time, they were especially unlikely to watch daytime television during the weekdays.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely viewing each program type by the percent in the total market who routinely views each program type. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that out-of-town convention attendees were 20% more likely to watch a particular program type than the general adult population.

Attending Out-of-Town Business Events
By Percent of Internet Usage to Research or Book At Least One Trip

Base: Total population (18 plus) who took a trip in the last two years, Canada & U.S. (mailback survey)



The incidence of Internet usage generally increased as the level of business event attendance increased. Two-thirds of those who attended one type of out-of-town business event reported using the Internet for general research while 28% booked a trip using the Internet during the past two years. Among those who attended two or more types of business events, Internet usage climbed to 77% with 35% booking a trip through the Internet. Clearly the Internet is an efficient channel by which to communicate with business event attendees.

Destination Image Mapping

- Technical Explanation -

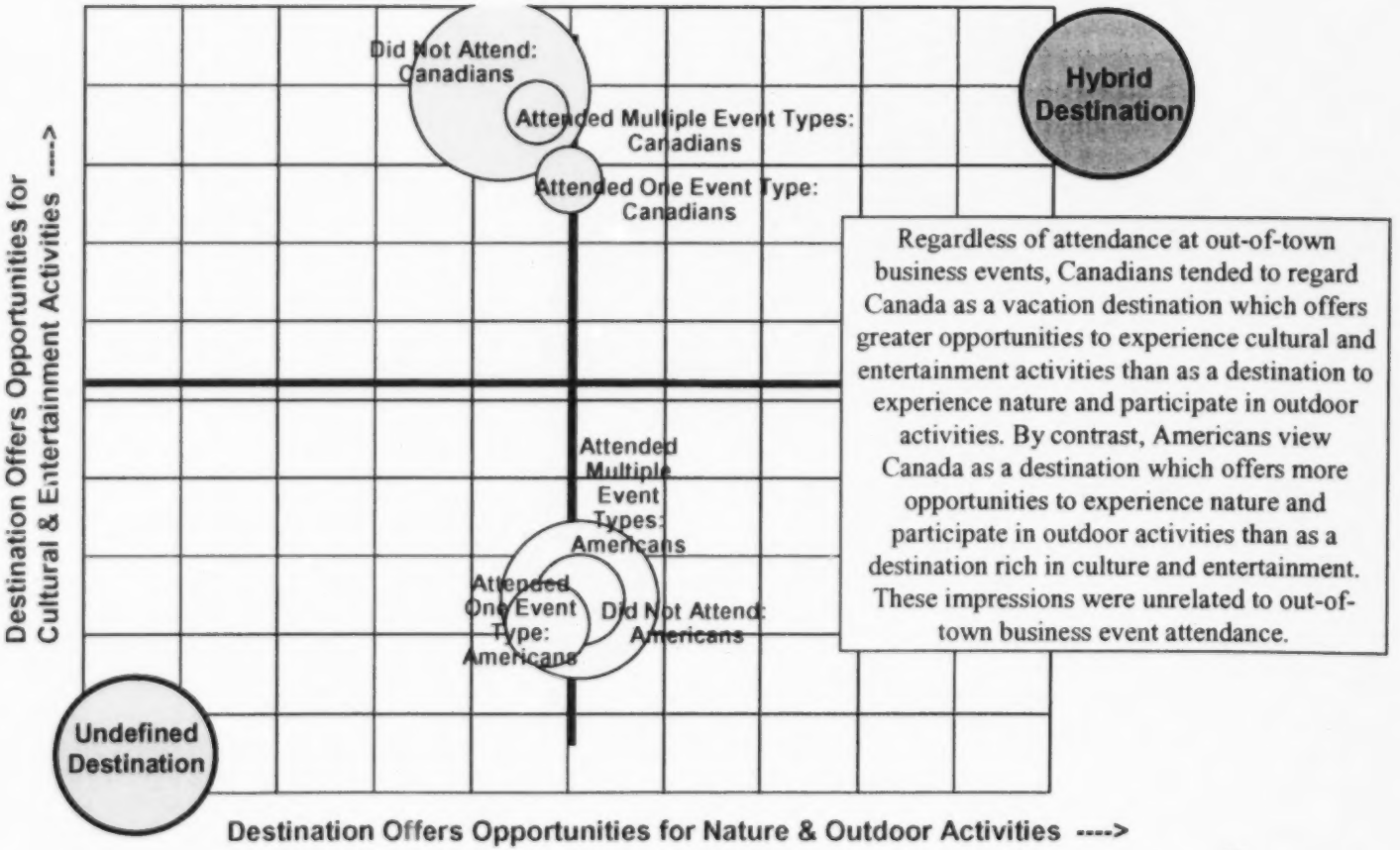
Respondents were asked to assess the image of Canada and Ontario on a ten-point rating scale for 25 image attributes. These ratings were factor analyzed to identify general image dimensions upon which Canada and Ontario were evaluated (see Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellent opportunities to experience cultural and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature or participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and cultural/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

Cultural & Entertainment Only
Cultural/ Entertainment and Nature/Outdoor Activities
Hybrid Destination
Neither Cultural/ Entertainment nor Nature/Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

Attending Out-of-Town Business Events

Canadian Vacation Imagery: Canada and United States

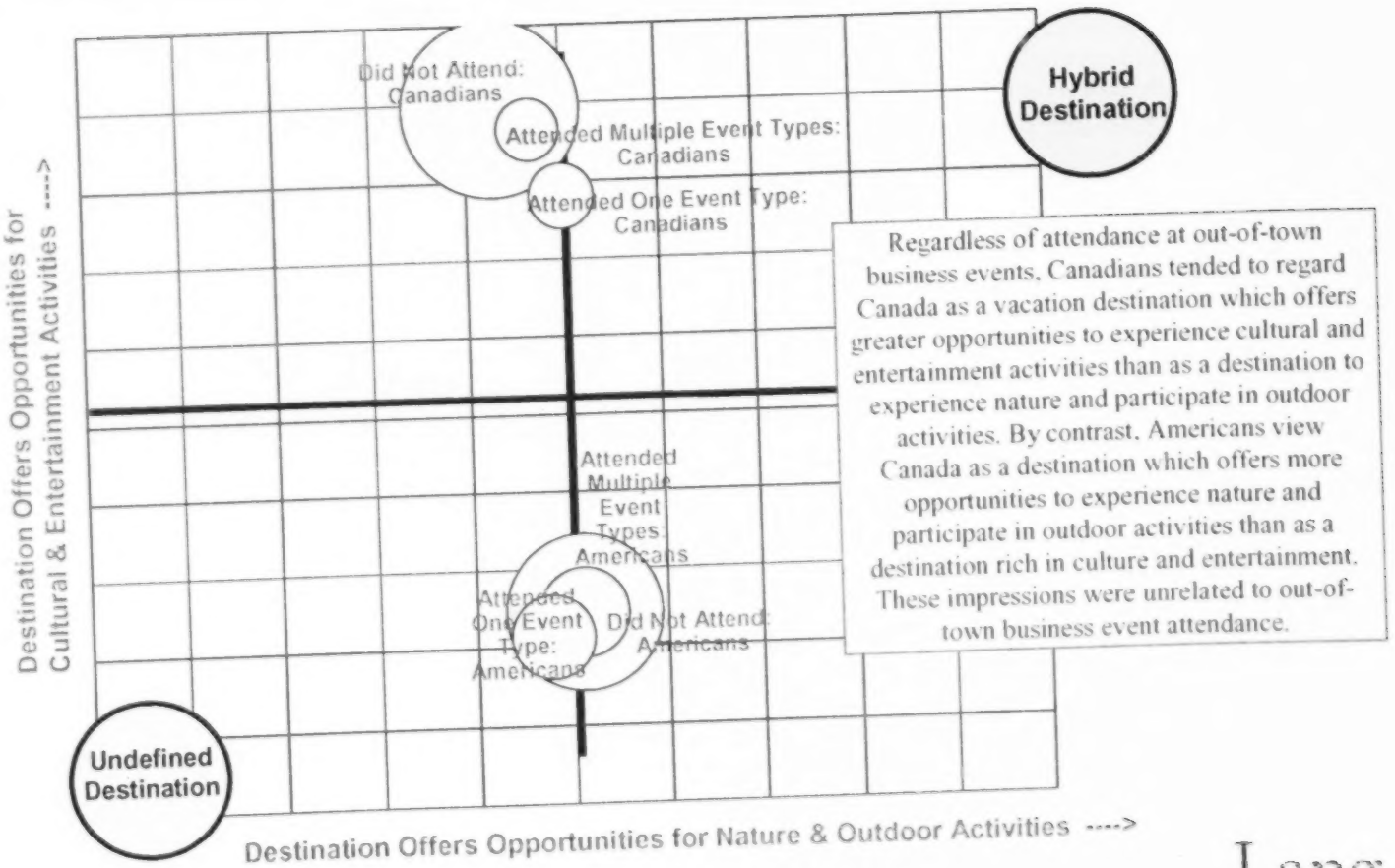
Base: Total population (18 plus) who took a trip in the last two years and able to rate Canada on one plus attributes, Canada & U.S. (mailback survey). Circle size denotes size of the market

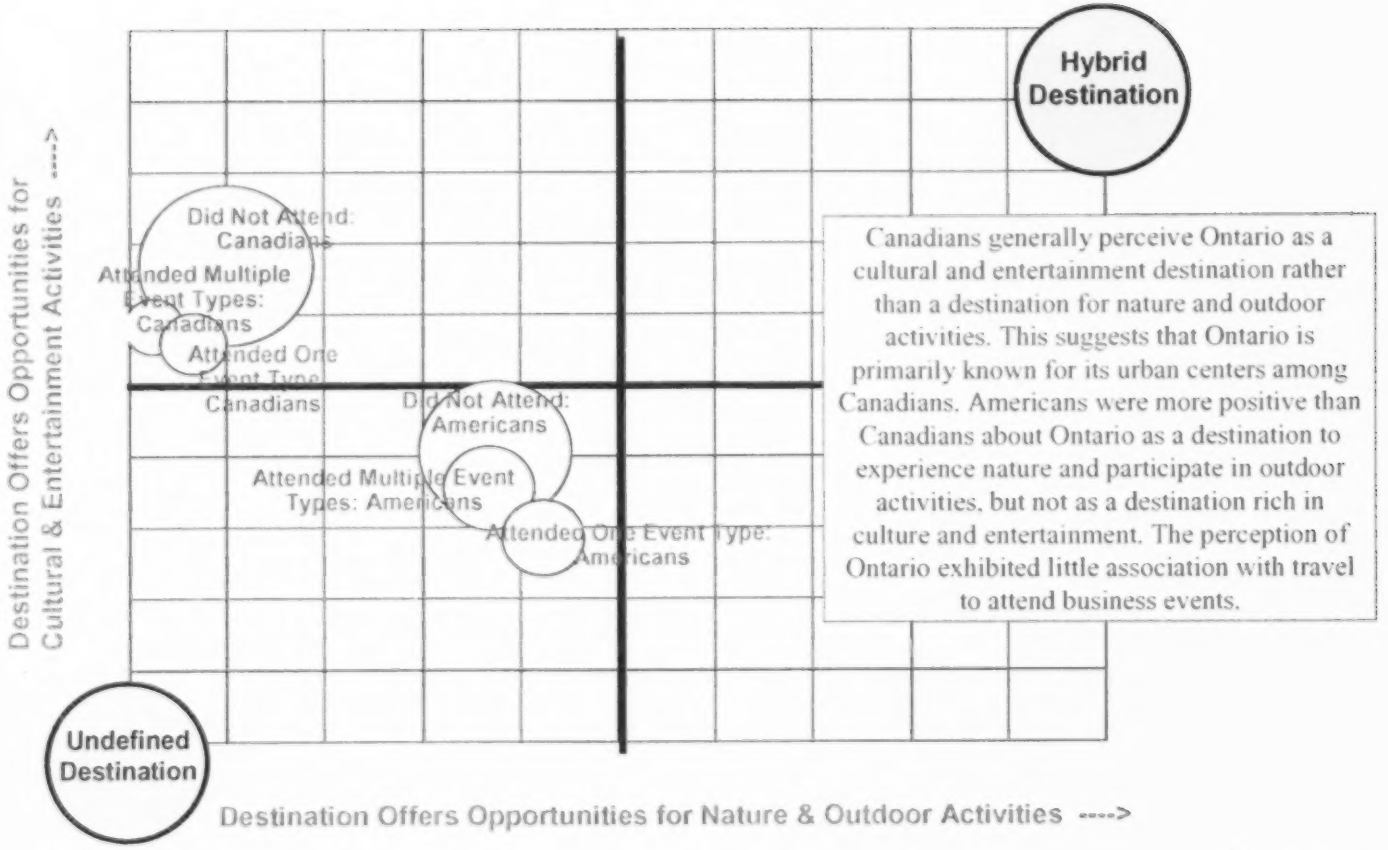

Did Not Attend: Canadians
Attended Multiple Event Types: Canadians
Attended One Event Type: Canadians
Hybrid Destination
Attended Multiple Event Types: Americans
Attended One Event Type: Americans
Did Not Attend: Americans
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

Regardless of attendance at out-of-town business events, Canadians tended to regard Canada as a vacation destination which offers greater opportunities to experience cultural and entertainment activities than as a destination to experience nature and participate in outdoor activities. By contrast, Americans view Canada as a destination which offers more opportunities to experience nature and participate in outdoor activities than as a destination rich in culture and entertainment. These impressions were unrelated to out-of-town business event attendance.

Respondents were asked to assess the image of Canada and Ontario on a ten-point rating scale for 25 image attributes. These ratings were factor analyzed to identify general image dimensions upon which Canada and Ontario were evaluated (see Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellent opportunities to experience cultural and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature or participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and cultural/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

Cultural & Entertainment Only
Cultural/ Entertainment and Nature/Outdoor Activities
Hybrid Destination
Neither Cultural/ Entertainment nor Nature/Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

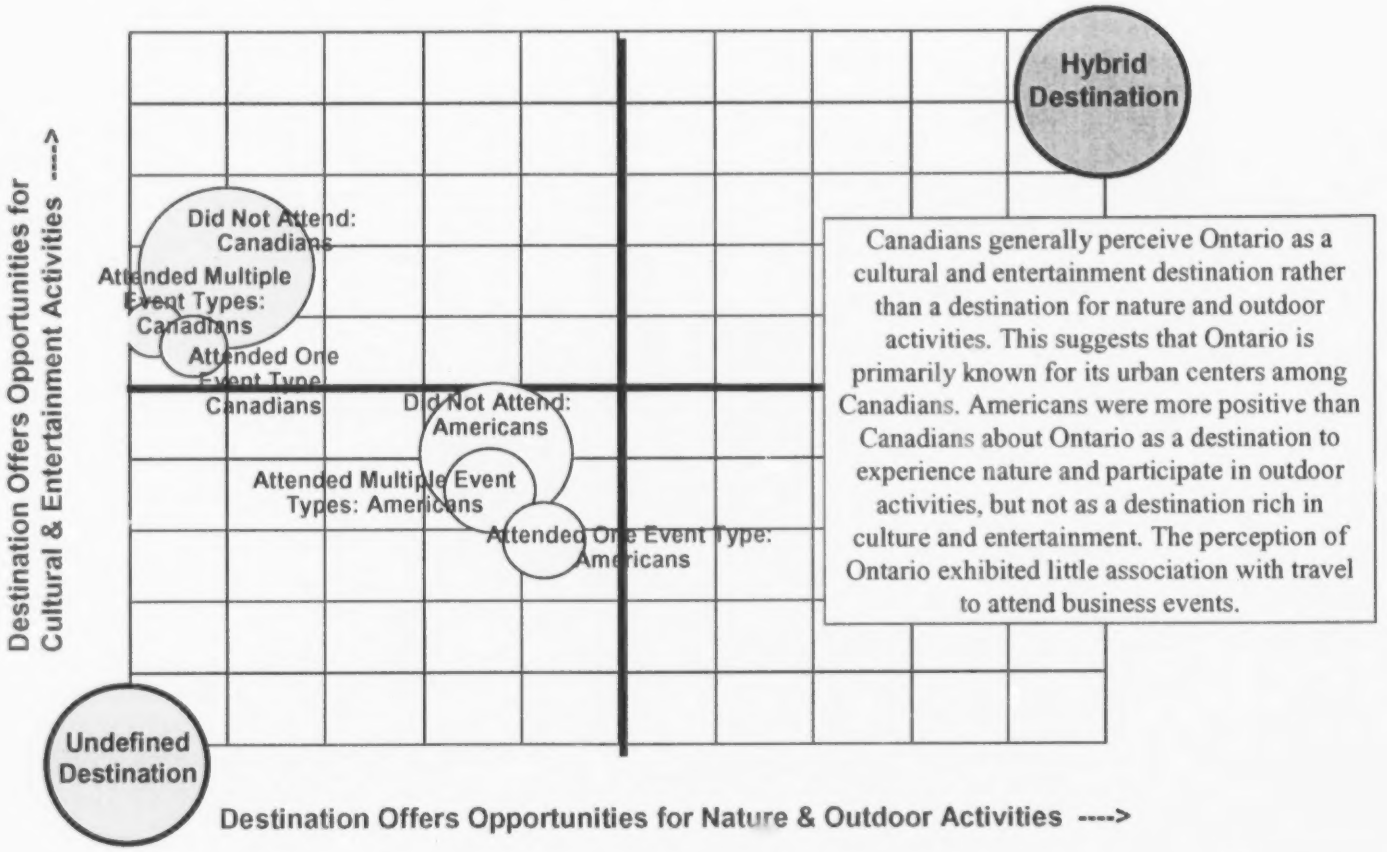

Hybrid Destination
Did Not Attend: Canadians
Attended Multiple Event Types: Canadians
Attended One Event Type: Canadians
Regardless of attendance at out-of-town business events, Canadians tended to regard Canada as a vacation destination which offers greater opportunities to experience cultural and entertainment activities than as a destination to experience nature and participate in outdoor activities. By contrast, Americans view Canada as a destination which offers more opportunities to experience nature and participate in outdoor activities than as a destination rich in culture and entertainment. These impressions were unrelated to out-of-town business event attendance.
Attended Multiple Event Types: Americans
Attended One Event Type: Americans
Did Not Attend: Americans
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->


Hybrid Destination
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->
Did Not Attend: Canadians
Attended Multiple Event Types: Canadians
Attended One Event Type: Canadians
Did Not Attend: Americans
Attended Multiple Event Types: Americans
Attended One Event Type: Americans
Canadians generally perceive Ontario as a cultural and entertainment destination rather than a destination for nature and outdoor activities. This suggests that Ontario is primarily known for its urban centers among Canadians. Americans were more positive than Canadians about Ontario as a destination to experience nature and participate in outdoor activities, but not as a destination rich in culture and entertainment. The perception of Ontario exhibited little association with travel to attend business events.

Attending Out-of-Town Business Events

Ontario Vacation Imagery: Canada and United States

Base: Total population (18 plus) who took a trip in the last two years and able to rate Ontario on one plus attributes, Canada & U.S. (mailback survey). Circle size denotes size of the market


Hybrid Destination
Did Not Attend: Canadians
Attended Multiple Event Types: Canadians
Attended One Event Type: Canadians
Did Not Attend: Americans
Attended Multiple Event Types: Americans
Attended One Event Type: Americans
Undefined Destination
Destination Offers Opportunities for Cultural & Entertainment Activities ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

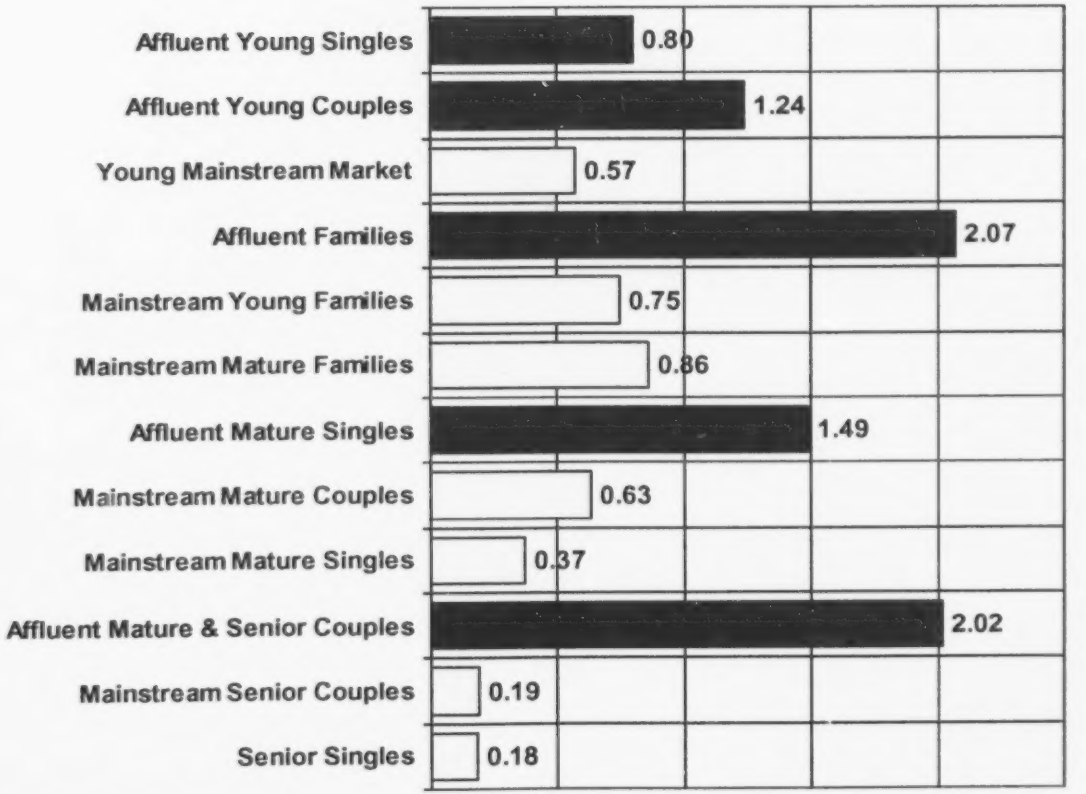
Canadians generally perceive Ontario as a cultural and entertainment destination rather than a destination for nature and outdoor activities. This suggests that Ontario is primarily known for its urban centers among Canadians. Americans were more positive than Canadians about Ontario as a destination to experience nature and participate in outdoor activities, but not as a destination rich in culture and entertainment. The perception of Ontario exhibited little association with travel to attend business events.

Attending Out-of-Town Business Events

Overall Market Potential: Canada

Business Event Attendance by Likelihood of Travel within Canada (Indexed)

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



The Overall Market Potential Index is constructed to identify those segments which were most likely to be responsive to marketing, advertising and promotional initiatives directed at people who attend out-of-town conferences, conventions, tradeshows, seminars. This Index indicates that, in Canada, four of the five affluent segments were clearly the main targets for such initiatives. Affluent Families and Affluent Mature and Senior Couples exhibit particular potential for this type of promotional activity although Affluent Young Couples and Affluent Mature Singles represent important secondary markets.

Technical Note

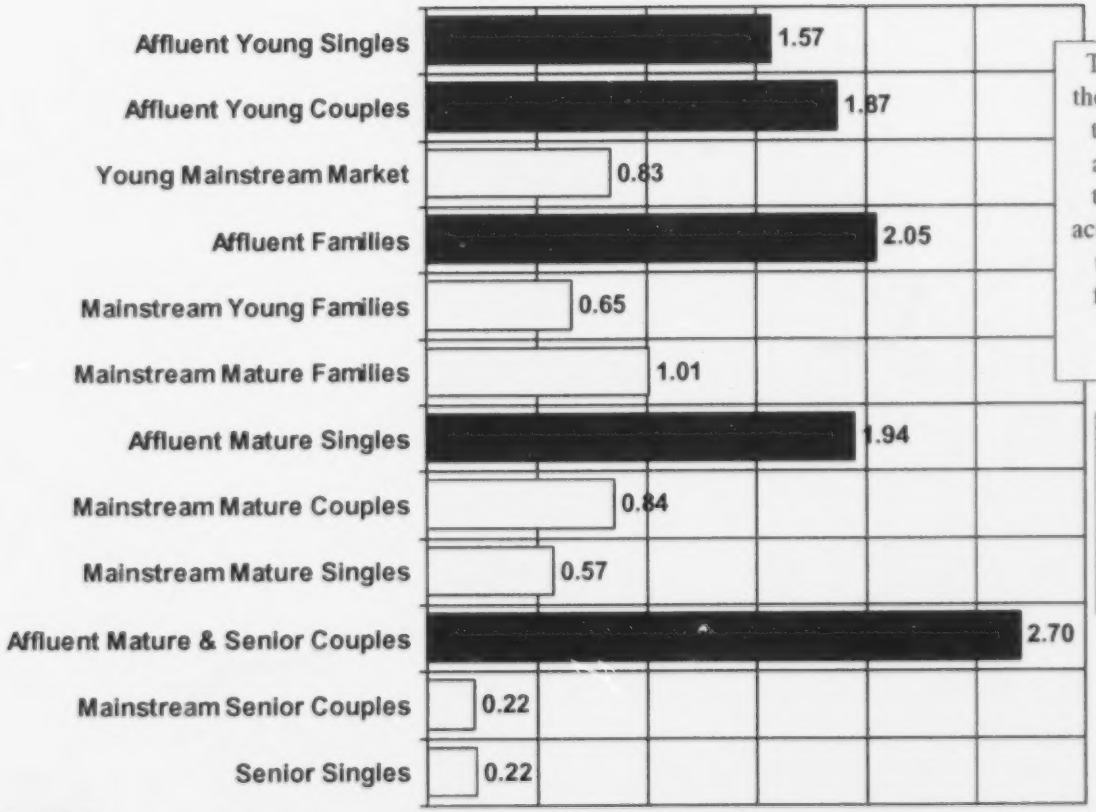
The Overall Market Potential Index is computed by multiplying the percent who attended out-of-town conventions and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below 1.0 reflect below average market potential.

Attending Out-of-Town Business Events

Overall Market Potential: United States

Business Event Attendance by Likelihood of Travel to Canada (Indexed)

Base: Percent of population (18 plus) who either travelled in last two years or intends to travel in next two years



The Overall Market Potential Index for the United States reveals a similar pattern to that observed for Canada in that the affluent segments are clearly the main targets for business event promotional activities. However, in contrast to Canada the Affluent Young Singles were also found to be among the prime markets. This market exhibits below average potential in Canada.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who attended out-of-town conventions and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below 1.0 reflect below average market potential.